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ABSTRACT

The commercials on the Sky Channel, the first pan-European satellite television channel, and on the West German Channel 2 (or ZDF) are analyzed in this report. The study summarizes an investigation of the economic consequences of transborder television advertising in Europe and the consequences for consumers if television advertising grows or is introduced into a country where, previously, no television advertising has been premitted. Included are: a description of the Sky Channel and the viewing of West German television commercials in Denmark, a documentation and description of the kind and amount of advertising on Sky Channel for three months and on ZDF for one week in 1984, and an analysis of the information content of the commercials. Additional details are provided on the history, audience, and programming of Sky Channel; the basic structure of West German television and the fundamental rules for West German television advertising; the study methodology; and the concern that transborder television advertising may cause a competitive disadvantage for local or national brands that cannot afford satellite or neighbor-country advertising. The coding scheme used for the content analysis is included. (LMM)

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COMMERCIAL TRANSNATIONAL AND NEIGHBOUR COUNTRY TV IN EUROPE. ECONOMIC CONSEQUENCES AND CONSUMER PERSPECTIVES

- CASE: SKY CHANNEL AND WEST GERMAN TV FROM A DANISH PERSPECTIVE

Preben Sepstrup

HANDELSHØJSKOLEN · ÅRHUS ·

TRYK HHÅ

INSTITUT FOR MARKEDSØKONOMI

1985

103084

Satellite Television, London has kindly submitted the necessary background material and tapes with the commercials.

Ms. Marlene Ölander has analysed the commercials from ZDF.

Ms. Jane Sølvsten has produced the manuscript.

The Aarhus School of Business Economics and Modern Languages has financed all expenses.

Graduate students Poul Faarup and Frits Thomsen have videotaped the ZDF commercials.

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1. PURPOSE

For many years the citizens of neighbour countries in Europe have watched each other's TV. The traffic has been predominantly one-way, especially between West Germany and its small neighbour countries: Austria, Belgium, the Netherlands and Switzerland. And from France to Belgium, Luxemburg, and Switzerland.
The high percentage of homes connected to cable in the small countries is motivated mainly by the desire for a more diversified supply of TV than the one or two channels supplied by the national broadcast authorities. (See EEC, 1983 and 1984 for details on the broadcast and cable situation in Europe.)

For the same number of years many politicians and commentators in the small countries - Denmark not the least - have worried about the cultural influence and the influence on the national language from especially West German television. And during the last few years - when intensive cabling has given 1/3 of the Danish TV-homes the technical possibility of watching West German television - it has been discussed whether the commercials in West German television influence the Danish consumers to a degree that gives brands advertised in West German television a competitive advantage compared with their Danish counterparts.
There is no TV-advertising in Denmark. In late 1984 the majority of the parliament wanted matters to stay that way. Does the reception of West German TV in this situation lead to unfair competition between those manufacturers and sellers of branded consumer goods in Denmark who can take advantage of their advertising in West German television and those who cannot?

Since the first plans for TV-satellites (i.e. high power satellites or Direct Broadcasting Satellites or DBSs') were published, there has been a parallel ongoing discussion in all European countries, small and large. To this discussion has been added a fear for the economic foundation of the advertising supported national broadcast institutions except

in Belgium and the Scandinavian countries where there is no advertising on TV.
The same discussion has of course taken place around the communication satellites (i.e. low power satellites or fixed service satellites or FSSs') since Eutelsat - independent of the European governments - in June 1983 made the decision to rent the transponders on the ECS-satellites to national and transnational corporations.
The DBSs' are not up yet, but the questions concerning the communications satellites are very real and as present for all European countries as the questions about neighbour country television have been for some countries for years. In the summer of 1984 one transponder was used by a French language, non-profit channel, and one was used by the transnational, Murdoch-owned Satellite Television (broadcasting "Sky Channel") with the dedicated purpose of profiting from cross border advertiser supported TV.
Eight more channels transmitted by the ECS-1 were planned to start in 1984. Other satellites will extend the transponder capacity to 42 by the end of 1985 (EEC 1983, Chaplin 1983).

The cultural effects of foreign national and transnational television are beyond the scope of this study, the main purpose of which is to furnish some facts to the - very often emotional - discussion of the economic consequences from the expected spread in Europe of commercial TV and TV-commercials from the national sphere to the international.
This expected development has an extra dimension in Belgium, Denmark, Norway, and Sweden since it is used as an argument for introducing advertising on the national TV-channels in those countries.
In this study the economic consequences are looked into in two ways, 1) By illuminating the argument about unfair competition as described above. And 2) by investigating the consequences for the citizens in their roles as consumers of goods and services if TV-advertising grows or is introduced for the first time. Denmark is here used as a kind of case

situation. But hopefully the study as a whole is also of international relevance.

The study analyses the commercials on the first pan European satellite television channel, The Sky Channel, in February, March, and April 1984, and the commercials on the West German channel 2 or ZDF.

The means of the study are 1) a description of the Sky Channel and the viewing of West German TV-commercials in Denmark. 2) a registration and description of the kind and amount of advertising on Sky Channel and ZDF for three months and one week, respectively. And 3) an analysis of the information content of the commercials.
For technical and legal reasons Sky Channel cound not be taped in Denmark in the beginning of 1984. Satellite Television of London has kindly edited tapes with the commercials for three months and put them to disposal for this study - and has helped with other material as well. The commercials from ZDF have been taped from a cable net in Arhus, Denmark.

The scope, methods, and material of this study could of course be extended a lot further. The cultural dimension of the internationalization of TV in Europe are not included. Neither are the consequences for programming of the reliance on advertising incomes. The economic dimensions are only illustrated in a limited way. And the problems of international regulation are not touched upon.
A main reason for the set up of this study has been to publish the results in time to have more than academic interest. It was designed to be a modest neutral contribution of facts to the often heated discussions among politicians, consumer unions, advertisers, and advertising agencies about TV-commercials, reception of satellites, and neighbour country signals.

2. METHOD

All commercials on Satellite Televisicns's Sky Channel in February, March, and April, 1984 and all commercials on the West German channel 2, ZDF, in week 15 (April 9-14, 1984) constitute the empirical basis of the study. It is not an investigation of a sample, representing a larger population, but in principle a "total" description of a limited population.
Despite this methodological approach it is of course interesting to what extent the descriptions of the three months and the one week, respectively, are valid beyond those periods.
The main reason for not establishing a representative sample of the population (commercials on Sky Channel and ZDF) - in the traditional meaning of the words - is that this population changes rapidly over time. This is more so for Sky Channel than for ZDF. Therefore the study of ZDF - other things being equal - is probably representative of a larger period around the time of the study than is the study of Sky Channel. Some parameters of the study have a higher external validity outside the periods under observation than others. This will be discussed in later chapters.

All commercials on the two broadcast stations have been content analysed by using the coding scheme in annex 1. The instructions for the coding - and thereby the definitions of the dimensions or cues which are included in the content analyses - are found in annex 2.
For discussions of the methodological questions and problems related to content analyses see Kassarjian 1977, Lucki and Pollay 1981, Gottschalk 1981, Pollay 1983 and Sepstrup 1980. The latter also in details discusses the methodology applied in this study, which is a methodological replica of the studies reported in Sepstrup 1980 and 1981. The variables used in this study are a sample of the variables used in those earlier studies.

The coding or registration of the dimensions relevant to the purpose of the study was done through questions answered by coders given the choice of answering "yes", "no" or "uncertain" (see annex 1).

All questions used in the coding procedure have been tested earlier in a study on sex roles in advertising (Sepstrup 1980) and in a study on information content in print advertising (Sepstrup 1981). As the object of the analysis here is TV-advertising and not print ads, a pilot test was conducted to check whether changes were necessary in the coding procedure due to the change of object. This was not the case. (Cf. Stern and Resnik 1977 and Stern, Krugman and Resnik 1981. These studies also use the same coding procedure, see 7.4.)
The pilot test lead to a decisions to analyse picture and sound together as is also done in all studies referred to in 7.4. (Picture and text were analysed separately in Sepstrup 1980 and 1981.) This means that a "yes", e.g. to the presence of an information cue is registered whether the information is sung, visualized or written on the screen.
The author coded the Sky Channel commercials. One of the five coders from the earlier studies of 4,237 print advertisments was born German and did the coding of the ZDF commercials.
All questions in the coding scheme were reliability tested in the earlier studies except the ones included from Stern and Resnik 1977 (se later). The procedure and reliability coefficients for the information cues are found in Sepstrup 1981. With very few exceptions they are close to one. The problem of reliability is further discussed in Sepstrup 1980.
The two coders involved were both very well trained a priori. All dimensions coded are very simple to decide on - warnings are given when this is not the case- and the few cues added from the Resnik and Stern study turned out not to be a problem. After a short period of retraining it was therefore decided that a renewed reliability test would be of formal

value only - and was therefore not carried out.
The Sky Channel commercials were coded twice with exactly the same results and the author has compared every ZDF coding scheme with the corresponding commercial. This lead to very few corrections, and almost exclusively concentrated on product classification and a few corrections from "yes/no" to "uncertain" and the other way around.

The normal procedure in content analyses of advertisements is to build a sample from the population of different commercials. By omitting duplicates each advertisement is only analysed once. The results are calculated on this sample of different advertisements. This is the procedure in all content analyses of TV-advertising referred to in this study (see 7.4.) and in the many studies of especially sex roles published during the last years (see e.g. Andren and Nowak 1978 and 1981 and Courtney and Whipple 1983).
The procedure described above could be called content analysis from the point of view of <u>production</u>. Each commercial has the same weight irrespective of the commercial being shown 1 or 100 times or the ad appearing in a magazine with a small or large circulation. This dominating procedure in advertising content analysis makes sence in some ways, but neglects the content of the <u>total</u> amount of advertising as such, disseminated to the consumers. This "total amount" depends on the content of the individual advertisements - which is registered according to the production principle - but also on the number of times an advertisements appears and on the circulation of the medium in which it appears. A content analysis which encompasses this could be called content analysis from the point of view of <u>exposure</u>, and may give a more fair judgement, e.g. of the information content or kind and amount of sex role socialization disseminated by advertising as such.
Sepstrup 1980 and 1981 demonstrate how to build a representative sample of print advertising for content analysis based on the exposure principle. In this study the results of the

content analysis are calculated according to both the production and the exposure principles. The production principle is used to make the results comparable with the international literature. The results are also calculated according to the exposure principle, because it is the best way to use content analysis to tell what is communicated by advertising as a whole - or at least because it produces another important picture.
In this study it is neither possible nor necessary to incorporate the circulation variable. But the number of times a commercial appears influences the reported results when calculated according to the exposure principle because a commercial is analysed each time it appears (or the content variables are weighted with the number of appeareances).
Table 17 illustrates that the two principles may produce different results. In this case the total amount of advertising on Sky Channel shows a more informative picture than when just analysing each commercial. The differences are small on ZDF because there is relatively little repetition during a week due to the organization of West German TV-advertising.

Content analysis cannot predict effects. Neither do the results about information content describe the effective or factual informativeness of the commercials as perceived by viewers. The content analysis rather measures their maximum potential of information - given the veracity of the information.
The viewers may not read, see or hear all information cues, they may not comprehend all that is perceived, they may not believe all that is comprehended, and they may not remember all that is believed. Obvious examples are company names exposed in small print for a few seconds or information printed on the package shown in the picture. Such details are registered in a content analysis, but probably not by most viewers. It is therefore most likely that a detailed content analysis - with the possibility of a frame by frame analysis - overestimates the perceived informativeness.

As a consequence of the purpose of this study it may be perceived as part of the methodology to concentrate on the basic facts. Put together with the limited material which is not fit for detailed analysis this means that the "statistical" analysis is restricted to mere counting. All figures are reported without decimals. Instead some effort has been invested in comparing the results with existing international data on the same subject.

3. SATELLITE TELEVISION'S SKY CHANNEL

3.1. History, background, audience

Satellite Television (SATV) was founded in September 1980. SATV obtained as the first private company in Europe access to a satellite for transmission of TV-signals in September 1981, namely Eutelsat's Orbit Test Satellite.
In August 1983 Rupert Murdoch's News International bought a 65% controlling interest of SATV at the cost of £ 5 million. News International expected at the time of the take over to invest another £ 10 million for further development of SATV (TV World, August 1983). At the time of the take over SATV had a potential of 350,000 cable homes in Finland, Norway, and Switzerland, but TV World estimated in August 1983 that the actual audience probably was less than 5% of this figure.
In June 1983 SATV had succeeded in renting one of the two transponders which Eutelsat had leased to British Telecom on ECS-1. Probably it was the access to the transponder that was worth the £ 5 million.

From its start SATV transmitted two hours per night. The generic programme schedule for Sky Channel's eight hours of broadcasting in May 1984 is shown in figure 1. A detailed programme schedule for the last week in April 1984 can be found in annex 3.

The 350,000 homes at the Murdoch take over had developed into 1.2 million in May 1983 or a potential of close to four million persons. Se table 1 for details.

3.2. Advertising on Sky Channel

In March 1983 TV World reported that SATV had managed to pull in a pool of 35 advertisers, but reckoned itself to need at least a pool of 100 regular clients to place SATV in a healthy situation. In March 1983 only half of SATV's available

Figure 1:

SATELLITE TELEVISION PLC · CRAVEN HOUSE · 25/32 MARSHALL STREET · LONDON W1V 1LL · TEL: 01-439 0491 · TELEX 266943

PROGRAMMING

SKY has progressively increased its nightly transmission from five hours in January to 8 hours from the 2nd of April. The station's general entertainment format embraces music, action series, feature films and made for T.V. movies and mini series, documentaries and now extensive sports coverage.

SAMPLE WEEKLY SCHEDULE—SPRING 1984

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
16.00	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC
17.00	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC
18.00	CARTOON TIME / FAMILY/COMEDY SERIES	CARTOON TIME / FAMILY/COMEDY SERIES	CARTOON TIME / FAMILY/COMEDY SERIES	CARTOON TIME / FAMILY/COMEDY SERIES	CARTOON TIME / FAMILY/COMEDY SERIES	FAMILY/ACTION SERIES	FAMILY/DRAMA SERIES
19.00	ACTION SERIES	DRAMA SERIES	MOVIE	DRAMA SERIES	ACTION SERIES	FILM MAGAZINE / MOVIE	LIGHT ENTERTAINMENT
20.00	ACTION SERIES	ACTION SERIES		DRAMA SERIES	ACTION SERIES		MOVIE
21.00	DOCUMENTARY / SPORT	SPORT	DOCUMENTARY / SPORT	SPORT	SPORT / LIGHT ENTERTAINMENT	LIGHT ENTERTAINMENT / SPORT	
22.00	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC	MUSIC
23.00	*MUSIC	*MUSIC	*MUSIC	*MUSIC	*MUSIC	*MUSIC	*MUSIC
24.00							

*Not available on Rediffusion networks

SKY—The Entertainment Channel

Table 1:

SATELLITE TELEVISION PLC · CRAVEN HOUSE · 25/32 MARSHALL STREET · LONDON W1V 1LL · TEL: 01-439 0491 · TELEX 266943

SKY CHANNEL NETWORK SUMMARY: 5.5.84

COUNTRY	SYSTEMS	CABLE HOMES	HOTEL ROOMS	TOTAL
HOLLAND	7	581,258	-	581,258
SWITZERLAND	26	373,219	695	373,914
FINLAND	7	101,105	1,691	102,796
AUSTRIA	1	95,000	-	95,000
NORWAY	6	89,812	79	89,891
U. KINGDOM *	17	20,740	-	20,740
W. GERMANY	1	2,545	-	2,545
FRANCE	1	-	1,027	1,027
TOTAL	66	1,263,679	3,492	1,267,171

* Since 29th March SKY CHANNEL has also been re-transmitted to 15 Rediffusion upgrade towns in the U.K. As yet, no subscriber figures are available for these towns.

(In August 1984 1,6 million households were connected to cables carrying Sky Channel)

advertising time was sold. Table 6 shows that the goal of a pool of 100 advertisers were still far away in the beginning of 1984. The 14,235 seconds sold during February, March, and April constitute 16.5% of the available advertising time in that period (six minutes per hour).

Figure 2 shows Satellite Television's sales arguments toward potential advertisers in spring 1984. SATV follows the rules of the British Independent Broadcasting Association, except for one thing: Sky Channel invites sponsoring of programmes. See figure 3.

All commercial TV-stations in Europe except the Finnish MTV and the British ITV bring their commercials in socalled blocks at fixed hours. Following the IBA-rules implicates that SATV shows the commercials between programmes and in socalled natural breaks, cf. the transmission log in annex 3. Details of advertising are found in Sky Channel's rate card in annex 4.

The Norwegian market research institute A/S Norsk Reklame-Statistik has monitored SATV from the very beginning. With this source the Norwegian Markedsføring, 1983/4, states that SATV in 1983 brought 2,513 spots for 38 advertisers. The Danish Orientering, 1983/3, quotes the same source for the information that half of the spots were sold during the first four months of 1983.
The six largest advertisers bought 610 or 59% of the 1035 spots during the first four months of 1983.
See table 2 and confer table 6 .

THE ADVERTISING MEDIUM

1. EUROPEAN AUDIENCES

Television is the most effective advertising medium and Satellite Television offers advertisers an entirely new opportunity - a European audience.

2. BRAND BUILDING/EUROBRANDING

Multi-national companies and manufacturers can now use Satellite Television to boost and enhance their brand image, harmonising product awareness across Europe.

3. AUDIENCE POTENTIAL

Satellite Television reaches cable audiences in Switzerland, Finland and Norway and in Britain and West Germany from the beginning of 1984. Other European countries, including Holland and Austria are changing their laws on the media to permit the reception of satellite transmission. And, in some cases, their first experience of television advertising.

4. COMMERCIAL EXPERIENCE

The commercial innovation of Europe's first and only Satellite Television channel has attracted advertisers like Coca-Cola, Kelloggs, Remington, Polaroid, Schweppes, Canada Dry, Wrigleys, Rank Xerox, Johnsons Wax and Unilever.

5. BROAD APPEAL

Satellite Television's commercial entertainment format will ensure that advertisers will reach by far the largest segment of the rapidly growing cable audience in Europe.

6. SELLING POTENTIAL

For the first time advertisers can explore new and exciting opportunities for selling to European audiences.

For further information, contact Mark Wood, U.K. Sales Co-ordinator in London at 01-439-0491 or Bernard Pingree, European Sales Co-ordinator in Geneva at 022-501-330.

7. STANDARDS

Until the EEC has decided on recommendations for television advertising, Satellite Television has decided:-

a. to conform to UK advertising, adopting guidelines set out by the British Independent Broadcasting Association to ensure a consistently high standard of advertising. In anticipation of revisions to these guidelines in respect of sponsorship SATV has instituted their own policy.
b. to voluntarily ban advertisements for tobacco and spirits.
c. to limit advertising to a maximum of six minutes per clock hour.
d. to use natural breaks rather than block advertising during programming.
e. that as SATV is an English-language service, the basic selling message of advertisements should be in English. However, a commercial with a background noise, jingle or packshot in a language other than English is acceptable providing an English translation is submitted.

For further information, contact Satellite Television Commercial Traffic and Copy Control Manager, Rosemary Stock.

BEST COPY AVAILABLE

Figure 3:

Watch Sky Channel on Friday May 18 - and enjoy Philips award-winning film Expertise World-wide.

Local air time:		
	Austria	16.00 hrs
	Finland	17.00 hrs
	France	16.00 hrs
	Germany	16.00 hrs
	the Netherlands	16.00 hrs
	Norway	16.00 hrs
	Switzerland	16.00 hrs
	United Kingdom	15.00 hrs

The international satellite station, Sky Channel, will be showing a fascinating film about Philips. The film – which has already won three major international awards – illustrates the strong innovatory character of the Philips company in a highly diversified range of areas and countries throughout the world.

Of course, Philips is a recognised innovator in many fields – and in perticular in the field of television and video. Not surprising, then, that Philips should now be one of the first companies to communicate with the public via satellite.

Sky Channel can be received through cable networks in Austria, Finland, Germany (Ludwigshafen), Norway, the Netherlands, Switzerland, United Kingdom (Swindon, Northampton) and the Méridien Hotel in Paris, France.

International Herald Tribune, Paris 17/5/84

Table 2:

Top 6 advertisers on Sky Channel, first four months, 1983

Advertiser	Number of spots
Kellogg's	139
Mill's Coffee	132
Freia Chocolate	130
Sor-bits	111
Ultramint	73
Coca Cola	65
	610

(Orientering, 1983/3)

The spot sale in the whole of Scandinavia totaled 2.5 million NKr in 1983 according to SATV's sales representative in Scandinavia (Orientering 83/3), who also expected the sale to total 7.5 million NKr in 1984 in Scandinavia (Markedsføring, 1984/4).

3.3. The audience

The international selling of Sky Channel to potential viewers is illustrated in figure 4. The number of cable homes reached by Sky Channel in August 1984 were 1.6 million (table 1).

In Norway Inter-Media has sponsored an investigation in the spring of 1982 when two hours of programming were distributed by the Orbit Test Satellite. Some scattered data from this research can be found in NOU 1983:5 and in Kampanje 7/8 1982.

Sky Channel advertising material from the spring of 1984 tells about viewing in Oslo and Helsinki in the autumn of 1983. See table 3.

Figure 4: The international selling of Sky Channel

SKY CHANNEL The Choice

More family entertainment on cable every night throughout Europe.
SKY CHANNEL brings Action Series, Drama, Movies, Music, Sport & Comedy.
Programmes include:—

Music—Sky Channel music box brings you an up-to-the-minute look at what's happening in the world of pop.
Films —Regular movie spots and 'behind the camera' features.
Sport—Including American Football, Wrestling, Basketball & Ice Hockey.
Entertainment—Shows and series for all the family.

For further details on how you can receive Sky Channel contact your local cable television operator.

PROGRAMME SCHEDULE WITH TRANSMISSION GROWTH

MONDAYS—FRIDAYS

	1600	1700	1800	1900	2000	2100	2200	2300
FEBRUARY 6 Hours		MUSIC	FAMILY SERIES	ACTION SERIES	ACTION SERIES	DOCUMENTARY/ SPORT	MUSIC	
MARCH 7 Hours		MUSIC	FAMILY SERIES	ACTION SERIES	ACTION SERIES	DOCUMENTARY/ SPORT	MUSIC	MUSIC
APRIL 8 Hours	MUSIC	MUSIC	FAMILY SERIES	ACTION SERIES	ACTION SERIES	DOCUMENTARY/ SPORT	MUSIC	MUSIC

WEEKENDS FROM APRIL

SATURDAY	MUSIC	MUSIC	FAMILY SERIES	MOVIE		SPORT	MUSIC	MUSIC
SUNDAY	MUSIC	MUSIC	FAMILY SERIES	ACTION SERIES	MOVIE		MUSIC	MUSIC

SKY CHANNEL Die Auswahl

Jeden Abend mehr Unterhaltung für die Familie im Kabelfernsehen in ganz Europa.
SKY CHANNEL bietet Ihnen Aktion Serien, Drama, Filme, Musik, Sport und Komödien.
Unter anderem:—

Musik—Sky Channel Music Box gibt einen aktuellen Einblick in der Welt der Pop Musik.
Filme —Regelmässige Ausschnitten aus Filme und Neuigkeiten aus der Filmwelt.
Sport —Inklusiv Amerikanischer Fussball, Ringkampf, Basketball und Eis Hockey.
Unterhaltung—Variété und Familien Serien.

Um Sky Channel empfangen zu können setzen Sie sich bitte mit Ihren Kabelnetzbetrieben in Verbindung.

Table 3:

Sky Channel reach in Oslo and Helsinki, October 1983

	Oslo		Helsinki	
	15+	15-34 yrs.	15+	15-34 yrs.
Weekly reach	45%	54%	49%	60%
4 weekly reach	50%	62%	59%	68%

Research financed by Sky Channel and Wrigley's

AB Bates a/s published in December 1983 a survey on attitudes toward introduction of TV-advertising in Norway. The survey showed that

- 6% of all Norweigan household can receive Sky Channel
- 25% of all households in the Oslo-area can receive Sky Channel
- The Sky Channel viewers are much more in favour of a new Norwegian TV-channel and much more positive toward advertising on this channel than the average Norwegian.
- 81% of the households able to watch Sky Channel do so. 94% of the same households watch the two Swedish channels, and 98% the Norwegian national channel. Nothing is said about frequency
- less than 20% of the Sky Channel viewers explain this by the quality of the programmes. More than 50% explain their viewing of Sky Channel by dissatisfaction with NRK, the national channel (Bates 1983).

Ogilvy & Mather's newsletter Euromedia, July 1984 has this to say about viewing of Sky Channel in Holland:

A telephone survey conducted in seven Dutch towns indicates that the initial response to Sky Channel has been positive. Fieldwork between May 10-14 shows that 57% of respondents had viewed Sky Channel at least once. On a single night, the breakdown of the audience watching any channel during the evening was 58% for Netherlands 1 and 53% for Netherlands 2, the two national landbased channels, and 20% for Sky. Of those who watched Sky, more than 50% viewed between 17.00-23.00 and 26% viewed after 23.00. The predictions are that 700,000 homes will be able to receive Sky by July and 1,000,000 homes by the end of the year. This represents a 21% penetration of all Dutch TV households.

It is possible that more research on the reception of Sky Channel exists in those countries receiving Sky Channel. However, it is not known to the author. In October 1984 Sky Channel was unable to submit further details.

4. WEST GERMAN TELEVISION IN DENMARK

There are three public television channels in West Germany:
Channel 1 (ARD-1) is a national channel except between 6 and 8 pm when the regional broadcast stations are responsible for the programming. ARD-1 carries advertising. The regional station received in Denmark is NDR (Norddeutche Rundfunk).
Channel 2 (ZDF) is a national channel carrying advertising.
Channel 3 (ARD-3) is a cooperation between the five regional broadcast institutions. The regional stations are responsible for both technique and programming, but the same programmes are shown on all five stations. ARD-3 does not carry advertising.

Channel 1 and 2 are each allowed 20 minutes of advertising per day which cannot be braodcasted after 8 pm. There is no advertising on Sundays and holidays.
Channel 1 carries 20 minutes of commercials in four socalled blocks between 6 and 8 pm (in the regional programmes).
Channel 2 also carries 20 minutes of commercials shown in blocks between 5.30 and 7.30 pm. The commercial blocks are not indicated in programme schedules. In their rate cards the channels state the exact time when the blocks start (ARD-1) or the precise interval (ZDF). Advertisers cannot decide when their commercials are shown. Commercials can only be ordered once a year. It is forbidden on both channels to advertise cigarettes and prescripted medicine.

The advertising income represents almost 1/3 of the total income of ARD-1 and close to 1/2 at ZDF. According to Media Perspektiven, 4/84, p 301 the price for a 30-second spot on NDR in the first quarter of 1984 was 15,026 DM. On an average 11% or 970,000 viewers were exposed to a commercial spot. From this follows a cost per 1000 viewers at 15.97 DM. The

ZDF price for 30 seconds was 56,257 DM, covering 10% or 4,400,000 viewers, or a cost of 12.80 DM per 1000 viewers. (1 DM = $ 0.35, September 1984.)

The cost per 1000 for ARD equals 58 DKR. The cost per 1000 readers for two popular Danish weekly magazines as Familie Journalen and Se og Hør for 1/1 page in full colour as 28 DKR and 25 DKR, respectively. The cost per 1000 Danish viewers on NRD - calculated for the lowest and highest number of viewers in figure 5 - as 4,218 and 527 DKR, respectively.
If the percentages in figure 5 can be transferred to a situation where all Danes technically can receive West German television, the prices per 1000 Danish viewers would be 1,406 DKR and 175 DKR.

The viewing of West German television in Denmark have been investigated by Denmark's Radio from January 23 to January 29, 1984. The results for the time intervals, where the commercials are run can be found in figure 5 and 6.

Table 4 shows West German programmes seen totally or partly by more than 10% of Danish viewers able to receive West German television.

Table 5.

Figure 5: The exposure of Danes to programmes around commercials in West German TV Channel 1 (ARD-1)/NDR, January 23-29, 1984. All hours pm.

% of Danes - 13 and up - able to watch West German television

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Time	Saturday
6.00	Programhin-weisen 0%	Programhin-weisen 1%	Programhin-weisen 1%	Programhin-weisen 1%	Programhin-weisen 1%	6.00	Tagesschau 1%
From 6.00	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING		
6.05	Die Sports-schau der Nordschau 3%	Auf Ache-Ar-riverderci 1 8%	Hart aber herzlich (1) 6%	Die Sports-schau der Nord-schau 3%	Der Jugend-richter (1) 2%	6.05	Die Sportsschau 9%
From 6.10	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	From 6.54	ADVERTISING
6.35	Sandmanchen 1%	Sandmanchen 3%	Sandmanchen 4%	Sandmanchen 2%	Sandmanchen 2%	7.00	Bericht vom Tage 1%
6.40	Meister Eder und sein Pu-mukel 3%	Auf Ache-Ar-riverderci 2 8%	Hart aber herzlich (2) 8%	Rummelplatz-geschichten 2%	Der Jugend-richter 2 2%		
From 7.10	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	From 7.10	ADVERTISING
7.15	Berichte von Tage 2%	Berichte von Tage 2%	Berichte von Tage 1%	Berichte von Tage 1%	Berichte von Tage 1%	7.15	Die aktuelle Schaubude 2%
7.25	Landespro-grammes 0%	Das Nordschau Magazin 0%	Das Nordschau Magazin 0%	Das Nordschau Magazin 1%	Das Nordschau Magazin 1%		
From 7.50	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	ADVERTISING	From 7.51	ADVERTISING
7.59	Programhin-weisen 1%	Programhin-weisen 1%	Programhin-weisen 1%	Programhin-weisen 1%	Programhin-weisen 2%	7.58	Programhin-weisen 0%
8.00	Tagesschau 1%	Tagesschau 1%	Tagesschau 1%	Tagesschau 1%	Tagesschau 2%	8.00	Tagesschau 1%

(Source: Danmarks Radio 1984. 1% = 13.710 persons.

Figure 6: The exposure of Danes to programmes around commercials in West German TV

Channel 2: (ZDF), January 23-29, 1984. All hours pm.

% of Danes - 13 and up - able to watch West German television

Time	Monday	Time	Wednesday	Time	Saturday
5.15	Teleillustrierte 3%	5.15	Teleillustrierte 2%	5.15	Landerspiegel 0%
5.50	Die Strasse von San Francisco 19%	5.55	Heute - Schlagzeilen 1%		
5.52 - 8.00	ADVERTISING	5.52 - 6.00	ADVERTISING	5.52 - 6.00	ADVERTISING
6.20	Heute - Schlagzeilen 7%	6.00	Wildes Weites Land 9 8%	6.00	Die Waltons 3%
6.25	Die Strasse von San Francisco 18%				
6.48 - 6.57	ADVERTISING	6.58 - 6.57	ADVERTISING	6.48 - 6.57	ADVERTISING
6.57	ZDF - Ihr Program 2%	6.57	ZDF - Ihr Program 2%	6.57	ZDF - Ihr Program 2%
7.00	Heute 6%	7.00	Heute 4%	7.00	Heute 2%
7.22 - 7.30	ADVERTISING	7.22 - 7.30	ADVERTISING	7.22 - 7.30	ADVERTISING
7.30	Reportage am Montag 2%	7.30	Direkt 1%	7.30	Die Pyramide 3%

cont'.

Figure 6 cont.'

Time	Tuesday	Time	Thursday	Time	Friday
5.15	Teleillustrierte 2%	5.15	Teleillustrierte 2%	5.15	Teleillustrierte 2%
				5.50	Pat und Pataschon 1 13%
5.42 - 5.50	ADVERTISING	5.42 - 5.50	ADVERTISING	5.52 - 6.00	ADVERTISING
5.50	Waldheimat 2%	5.50	Flohmarkt-Nagelprobe 1%		Pat und Pataschon 1 13%
6.15 - 6.23	ADVERTISING	6.15 - 6.23	ADVERTISING	6.15 - 6.23	ADVERTISING
6.20	Mein Nam' ist Hase 12%		Mann, halt die Luft an 3%	6.15	Heute - Schlagzeilen 7%
6.47 - 6.50	ADVERTISING	6.47 - 6.50	ADVERTISING	6.47 - 6.50	ADVERTISING
6.57	ZDF - Ihr Programm 2%	6.57	ZDF - Ihr Programm 2%	6.20	Pat und Pataschon 2 12%
7.00	Heute 4%	7.00	Heute 4%	6.57	ZDF - Ihr Programm 3%
7.22 - 7.30	ADVERTISING	7.22 - 7.30	ADVERTISING	7.00	Heute 5%
7.30	Unser Mann vom Südpol 8%	7.30	Dalli Dalli - Spiel und Spass 33%	7.22 - 7.30	ADVERTISING
				7.30	Auslandsjournal 1%

(Source: Danmarks Radio 1984. 1% = 13.710 persons.

Table 4:

West German programmes seen by more than 10% of Danish viewers able to do so. Week 5, 1984. Ages 10-12 and more than 12 years.

Time of day, pm	Channel	Programme	% of viewers	
			12+	10-12
7.30	II	Dalli, Spiel und Spass (quiz)	33	23
9.45	I	Dallas	24	12
9.00	II	Der Denver Clan (Dynasty)	21	17
8.15	II	Zähl bis Drei und bete (American movie picture)	20	19
5.50	II	Die Strassen von San Francisco (American detective series)	19	18
10.00	III	Das Gruselkabinett (American movie picture)	17	7
8.15	II	Live aus Böblingen (music and song show)	17	8
9.00	II	Jagdscenen in Hollywood (Tom & Jerry)	15	13
5.50	II	Pat und Pataschon (Fy and Bi, old comedians)	12	18
6.20	II	Mein Nam' ist Hase (animated film)	12	6
9.45	I	Musikladen (Video-music)	11	3
8.15	III	Der Prinz und der Bettelknaoe (American movie picture)	11	15
8.15	I	Einer wird gewinnen (quiz)	11	3
8.15	I	Die nackte Frau (Italian movie picture)	10	9
10.20	I	Vera Cruz (American movie picture)	10	7

The percentages cover "seen totally" and "seen partly".
Source: Svendsen 1984b And Denmark's Radio 1984.

5. WHAT KIND OF ADVERTISING AND HOW MUCH?

5.1. Sky Channel, primo 1984

Table 5 shows the brands advertised on Sky Channel during February, March, and April (week 5-17), 1984, including spot length and repetition. 18 consumer brands representing 12 different independent companies were advertised. The spot length varies from 10 to 50 seconds. 30-seconds spots are the dominant spot length. Repetition varies much between brands. Three brands account for approximately 40% of all commercial time sold by Sky Channel during the three months. A month by month registration of the same figures are found in annex 5.

In table 6 the Sky Channel advertising is categorised according to the product categories in the coding scheme (cf. annex 1). The classification of each brand is shown in annex 6. Two product categories "chocolate, sweets, gum", and "food products") include 69% of the advertised brands and 76% of the commercial time sold by Sky Channel. "Chocolate, sweets and gum" alone take up 58% of the time.
The product categories 8, 12, 13, 14, 20, 21 in table 6 account for 90% of the advertised brands and 97% of the commercial time. Most products in those categories are low involvement products which are basically identical as to physical characteristics and the needs and functions they fulfill. Such products and brands typically use the ability of TV advertising to add psychological values and life style dimensions to the brand images, thereby helping them to differentiate from competing brands.
The time used for commercials on Sky Channel in the period under observation was very limited compared to most commercial TV stations, constituting only 16.5% of the maximum 86,400 seconds of commercial time that Sky Channel was prepared to sell, corresponding to six minutes per hour during the three months.

Table 5:

Sky Channel: Commercials in February, March, and April (week 5-17) 1984

Brand	Spot length in seconds	Number of times shown	Number of times shown %	Total time secs.	Total time %
Wrigley's P K Gum	30	90	17.8	2,700	19.0
Mars Snickers	30	65	12.8	1,950	13.7
Sor-Bits Chewing Gum	20	61	12.0	1,220	8.6
Bentasil	15	27	5.3	405	2.8
Impulse Perfume Spray	30	25	4.9	750	5.3
Kellogg's Smacks	30	24	4.7	720	5.1
Frolic Dog Food	30	23	4.5	690	4.8
Omega wrist watch	30	23	4.5	690	4.8
Coca Cola	30	22	4.3	660	4.6
The Sun	20	22	4.5	440	3.1
Freia Milk Chocolate	50	21	4.1	1,050	7.4
Freia Rapid Bar	30	19	3.8	570	4.0
Maryland Cookies	30	19	3.7	570	4.0
Wrigley's Juicy Fruit	30	17	3.4	510	3.6
Uncle Ben's Rice	20	13	2.5	260	1.8
Kellogg's Frost Flakes	30	12	2.4	360	2.5
Kellogg's Corn Flakes	30	11	2.2	330	2.3
Kellogg's Rice Krispies	30	11	2.2	330	2.3
Scand-Video	30	1	0.2	30	0.2
19 brands		506	100.0	14,235= 3h59m45s	
Omega identification and clock	10	267 (week 5-15)			

Source: Sky Channel's transmission logs, week 5-17, 1984 submitted by Satellite Television. Se Annex 5 for more details.

Table 6

Amount and kind of advertising on Sky Channel in February, March, and April 1984 according to the product classification used in the coding scheme

Category	Number of brands	% of brands	Total time in seconds	% of time
7: Books, magazines, newspapers	1	5	440	3
8: Chocolate, sweets, gum	7	37	8,405	58
12: Soft drinks	1	5	660	5
13: Food products	6	32	2,570	18
14: Pet food	1	5	690	5
20: Personal care, hygiene	1	5	750	5
21: Watches, jewelry, glasses	1	5	690	5
25: Other	1	5	30	0
All products	19	99	14,235	99

Source: Content analysis and transmission logs. See annex 6 for details about the product classification.

Annex 7 compares the results in table 6 with similar tabulations from Sky Channel, the British ITV and Channel Four, and The West German channel 2, ZDF. The figures vary considerably, but basically they all tell the same story: TV advertising concentrates on sweets, drinking and eating - and, in West Germany, on cleaning and personal care. The figures also indicate that the national British channels ITV and Channel Four, and the national West German channels NDR and ZDF cover a wider spectrum of goods than does the pan European Sky Channel.

5.2. West German channel 2, ZDF, April 9. - 14., 1984

Previewing of the West German ZDF channel indicated that one week's programmes carried enough commercials for the analytical purpose of this study and many more different commercials than Sky Channel in three months. Therefore,

it was decided to analyse one week's commercials from ZDF, viz. week 15, 1984, the choice of the exact week being rather circumstantial and dictated by practical reasons.
In week 15 246 different brands were advertised on ZDF. During three months Sky Channel had 19 different brands and 506 spots altogether, whereas ZDF had a total of 310 spots. Commercials for 50 of the 246 brands were repeated. Very few were repeated more than once. Most likely this lack of repetition is the result of the booking system for commercials in West Germany, (cf. chapter 4) rather than a consequence of an intended advertising strategy. Therefore table 5 is not replicated for ZDF. A total registration in chronological order of all brands and products advertised on ZDF in week 15, 1984, and the product category the products have been placed in for the purpose of constructing table 7, is shown in annex 8.

Table 7 shows the number of brands, the number of spots and the time for each product category in the coding scheme, and thus parallels table 6 for Sky Channel. Three product groups dominate in table 7. "Personal care" takes 22% of the total commercial time, "food products" 17%, "cleaning and washing" 13%. In total 52% of all commercial time that week on ZDF. Those three product categories are followed by the dominant product category on Sky Channel: "chocolate, sweets and gum" with 8% of the time. Only three other product categories occupies more than 5% of the time: "durables for home and garden", "soft drinks", and "insurance and banking".
Again, it is obvious that the dominant products are non-durables, uncomplicated, low involvement products and areas with a rich supply of brands, which are functionally very much alike. As mentioned above such brands needs to differentiate themselves. And TV advertising can do this by building up brand images.

Table 7

Amount and kind of advertising on ZDF, week 15, 1984, according to the product classification used in the coding scheme

Product category	Number of brands	% of brands	Number of spots	% of spots	Total time seconds	% of total time seconds
1: Cars	2	1	2	1	50	1
2: Boats	0	0	0	0	0	0
3: Women's clothing	4	2	5	2	110	1
4: Men's clothing	1	0	1	0	30	0
5: Children's clothing	0	0	0	0	0	0
6: Durables for home & garden	20	8	29	9	630	8
7: Books, magazines, newspapers	8	3	9	3	200	3
8: Chocolate, sweets, gum	19	8	28	9	610	8
9: Wine	0	0	0	0	0	0
10: Liquor	4	2	4	1	105	1
11: Beer	0	0	0	0	0	0
12: Soft drinks	12	5	15	5	375	5
13: Food products	54	22	68	22	1300	17
14: Pet food	2	1	2	1	255	3
15: Foto and film	5	2	6	2	130	2
16: Toys	8	3	11	3	230	3
17: Cleaning, washing	30	12	35	11	985	13
18: Gas, oil	2	1	2	1	50	1
19: Tobacco, cigarettes	0	0	0	0	0	0
20: Personal care, hygiene	53	22	62	20	1640	22
21: Watches, jewelry, glasses	3	1	4	1	60	1
22: Insurance, banking	11	4	14	5	440	6
23: Public announcements	0	0	0	0	0	0
24: Travelling	0	0	0	0	0	0
25: Other	8	3	13	4	330	5
Total	246	100	310	100	7530	100

In annex 7 the ZDF distribution of advertising time on product categories is compared with Sky Channel, ITV, Channel Four - and the same distribution on ZDF for the whole of 1983.
There are seasons in all advertising. However, the distribution of product categories on ZDF during the whole af 1983 and during week 15, 1984 are astonishingly alike. And so identical that this might be taken as an indication of the representativenes of the material gathered during week 15, outside this period. As mentioned above the two British national channels and ZDF carry a much more diversified spectrum of products than the super national Sky Channel. This may be because brands are more internationalized for some products than for others. It is remarkable how dominating "cleaning, washing" and "personal care" are on the German ZDF compared to the English language channels.

Table 8 compares the product categories' share of time on ZDF and Sky Channel with the same product categories' share of household budgets in Denmark. If Danish household budgets do not deviate too much from consumer budgets in other North European countries it is remarkable how different shares of budget and shares of advertising time are on some items. One might say that consumers are extremly "overinformed" on certain items. Which of course also tells something about the different interests of consumers and TV-advertising.

Table 8:

Product categories' share of household budgets and share of commercial time on ZDF and Sky Channel

Number of budget item in Danish Statistical Surveys	Corresponding product category in coding scheme	% of budget in Danish households	% of advertising time on ZDF, week 15, 1984	% of advertising on Sky Channel, Feb., Mar., and April, 1984
110	Chocolate, sweets, gum	1,9	8	58
111-120	Food	15,8	17	18
121-122	Soft Drinks	0,7	5	5
131	Liquor	0,6	1	0
132	Wine	0,7	0	0
133	Beer	1,6	0	0
141-142	Tobacco and cigarettes	2,9	0	0
211 + 221	Clothing	6,1	1	0
411 + 421 + 431 + 441 + 711	Durables for home and garden	7,9	8	0
611	Cars	5,4	1	0
622	Gas and oil	3,0	1	0
731	Books, magazines newspapers	1,7	3	3
812 + 822	Personal care	0,8	22	5
821	Watches, jewelry, glasses	0,4	1	5
451	Cleaning and washing	1,1	13	0
		50,6	81	94

Source: Statistiske Efterretninger, A, 1980, 1, tabel 3.8.
The remaining 50% of household expenditures having no correspondance among product categories are mainly, rent, heating, and transportation. The remaining percentages in the distributions of advertising time are for categories which are not specified in the household statistics.

6. THE COMPETITION ARGUMENT

The competition argument states that transborder TV-advertising may cause a competitive disadvantage for local or national brands which cannot on an economically sound basis use satellite or neighbour country advertising. The argument further assumes that this competitive disadvantage has a negative influence on national economic activity. Also according to this argument the potential competitive disadvantage is especially threatening if local or national brands have no access to a national TV as is the case in Scandinavia and Belgium.

In Denmark the advocates of the competition argument claim that the competitive disadvantages will be experienced by what they call "Danish brands". However, this is a very ambigious phrase since it is very difficult to define "Danish" in this context. Probably it is more correct to say that the important issue in all countries is the concequences for the national economic activity, e.g. as measured by the number of jobs or the tendency to re-invest parts of the profit in the country where the money is earned.

The seriousness of the competition argument depends on a number of factors. The most important ones are discussed below.

6.1. All sectors of the consumer goods industry are not affected in the same way

Using Denmark as an example:
a: The capital behind a large number of branded goods sold in Denmark is not or is only to a limited extent owned by Danish citizens. So the brands are not "Danish". But if their production and/or sale generates employment in Denmark this production and sale is positive for the Danish ecnonmy.

Examples are Pepsi cola, Kellogg's cereals and Philips bulbs.
This category of companies producing, selling and distributing brands advertised on transborder TV advertising are either indifferent to or favoured by transborder TV advertising. The competition argument has no validity for this category of companies in so far as they generate employment by production, distribution and sales activities.

b: The capital behind another large number of branded consumer goods sold in Denmark is totally or predominantly owned by Danish citizens. Some of these companies sell and advertise on TV internationally as for example B&O, LEGO, Tuborg, Danish bacon. Through their international marketing efforts they may obtain the same advantages as "foreign" brands towards brands sold nationally only. Thus the competition argument has no validity for this category of companies.

c: The turnover and employment in retailing and other distribution activities are not - or to a very limited degree only - affected by transborder TV advertising.

d: The last group consists of companies producing branded goods fit for TV advertising and predominantly sold in Denmark in competition with foreign/international brands.
The competition argument is relevant for this group of companies.

6.2. The kind of products advertised on TV

TV advertising concentrates on a limited number of product categories as shown in table 6 and 7 and in annex 6, 7, and 8. The tables and annexes tell that TV advertising is concentrated on cleaning. personal care, drinking, and eating (especially instant food, snacks, sweets and diet food).

The limited range of potential competitive effects from transnational TV advertising is further illustrated in table 8 which shows that:

On Sky Channel

58% of the commercial time concern	1.9% of the average household budget
76% - - - - -	-17.7% - - - - -
95% - - - - -	-19.6% - - - - -

And on ZDF

22% of the commercial time concern	0.8% of the average household budget
39% - - - - -	-16.6% - - - - -
52% - - - - -	-17.7% - - - - -
78% - - - - -	-27.5% - - - - -
91% - - - - -	-45.4% - - - - -

The results concerning the concentration of TV advertising are general, cf. tables 6, 7 and annexes 6, 7, and 8.
The characteristics of TV advertising as to the kind of products involved further limits the economic sector for which the competition argument is relevant.
The products advertised on TV can also in general be characterised as low involvement products about which very little can be said from the advertiser's point of view, since they are very much alike. This kind af products normally has a high price elasticity. Even though it is the purpose of TV advertising to lower the price elasticity this high price elasticity makes it easier to fight back in competition on a national/local level.

6.3. The ratio of international brands

The influence from transborder TV advertising on a national economy depends on

- the ratio of international brands in that advertising
- the ratio of those international brands sold in the nation under consideration.

There is an ongoing discussion in professional circles whether to market on a national or international level, e.g. whether to use one brand, one advertising theme, one

advertising agency or to stick to the dominant European practice today, namely a nationally differentiated marketing approach.
The topic of world brands is discussed in a special edition of Advertising Age, June 25, 1984, advocating that many transnational companies are preparing themselves for world branding and giving many examples of this. For further discussion and examples see also BBDO Magazine, February 1984.

Apparently very little is published on the degree of internationalization of brands. Holmlöv and Julander 1984 reports that half of the 20 brands most advertised on ITV and Channel Four in June 1983 could be found with the same name in at least one more country than the United Kingdom. 7 of the 20 brands were sold in Sweden. Holmlöv and Julander also found that 2/3 of the brands advertised on Sky Channel in the weeks 1-35, 1983 - cf. annex 7 - were sold in more than one country. Unfortunately it is not told how these figures are produced and no brand names are given.

Table 5 and annex 8 show the brands advertised on Sky Channel and ZDF in the periods of this study. With that information it is possible in principle for a country receiving the two channels to find out which of the brands are sold in that country, what their market shares are, who the competitors are, whether there is a production of the brands in the country, how many employees are involved, how is the profit and ownership, and how big a share of the average consumer budget is involved.
The answers to those questions should give an idea of the effect of a specific transborder advertising on a national economy. However, this would be a research project of its own the main problem of which will be to produce the necessary facts. Another problem is that production, selling and renaming of brands can change relatively fast and probably will change in the direction of more international brands if the satellite channels become a succes.

Using Denmark as en example the "internationalization" dimension of the competition problem can be illustrated at the beginning af 1984 by using the information in table 5 and annex 8.

At Sky Channel (table 5) 16 of the 18 consumer brands advertised were sold in Denmark - the only exceptions being Maryland Cookies and The Sun. This indicates a high degree of internationalization among the Sky Channel advertisers. Which of course is no surprise. The high degree of internationalization (89%) is - all other things being equal - in favour of an influence on competitive conditions in Denmark if Sky Channel had been in the cables. As to the range of this influence see tabel 8 and section 6.2.

Surprisingly it has proved extremely costly to check whether a brand is registered in Denmark through the public trade mark register. The search must be done by an employee of the register, needing four hours of work per brand. Besides, registration does not necessarily mean the brand is sold.
The information on brands sold in Denmark therefore relies on the advertising statistic "Danske Fakta", visits to the largest stores, and the help of qualified housewifes.
The reliance on those sources makes it possible to say positively that a brand is marketed in Denmark. However, it is impossible to be 100% certain that a brand that cannot be identified through those sources is not sold in Denmark in some kind of shop or e.g. in the border regions. The figures in the following concern the exact name used in the ZDF commercials.

91 of the 246 brands (37%) advertised on ZDF were positively identified as sold in Denmark. Those brands took up 38% of the commercial time.
This relatively low degree of "internationalization" decreases - other things being equal - the competitive effect of West German television in Denmark.

The potential competitive effect is concentrated on very few product categories. The distribution on product categories of the 91 brands sold in Denmark is found in table 9. 55% of the brands are in the categories "durables for home and garden", "food products", and "personal care", corresponding to 24,5% of the average household budget, cf. table 8. If "soft drinks" and "cleaning and washing" are added 73% of the 91 brands are covered and 26,3% of the household budget.

6.4. The amount of advertising supplied

It is very difficult to predict the amount of TV advertising that will cross the European borders in the years to come.

In the period under observation in this study much advertising crossed the borders between neighbour countries, but only one commercial pan European TV channel was broadcasting, using only 16.5% of its announced advertising capacity. However, it is certain that several advertising financed channels will follow Sky Channel.
The limited interest in pan European TV advertising when this study took place may indicate a limited interest in the advertising community. Or it may indicate that European companies are not yet organized for that kind of medium. It may also reflect the relative limited number of homes connected to cables carrying Sky Channel.

A growth in pan European advertising among other things depends on the spread of cable, the laws governing reception of foreign TV advertising and the development of international brands. Therefore nothing can really be told from the figures for Sky Channel in this study concerning the amount of international TV advertising - as opposed to the kind of advertising.

It is important to notice that more international TV and more national TV crossing the borders by way of cable and satellite does not automatically produce more TV advertising.

Table 9:

Number of brands in product categories advertised on ZDF in week 15 and sold in Denmark

Product category	Number of brands	% of brands
1: Cars	1	1
2: Boats	0	0
3: Women's clothing	1	1
4: Men's clothing	0	0
5: Children's clothing	0	0
6: Durables for home and garden	12	13
7: Books, magazines, newspapers	2	2
8: Chocolate, sweets, gum	5	6
9: Wine	0	0
10: Liquor	2	2
11: Beer	0	0
12: Soft drinks	8	9
13: Food products	19	20
14: Pet food	1	1
15: Foto and film	4	5
16: Toys	2	2
17: Cleaning, washing	8	9
18: Gas, oil	1	1
19: Tobacco, cigarettes	0	0
20: Personal care, hygiene	20	22
21: Watches, jewelry, glasses	1	1
22: Insurance, banking	0	0
23: Public announcements	0	0
24: Travelling	0	0
25: Other	4	5
	91	100

See annex 8 for details

The amount of advertising may grow a little - e.g. because of a reduction of prices - but relatively less than the advertising capacity on channels competing for a share. Thus while Sky Channel still fought to fill 1/5 of its available commercial time, in July 1984 another English-language programme - Music Box - started transmitting over ECS-1 competing for the same advertisers.

Also noteworthy is the fact that the growth itself of transborder TV reduces the attractivenes of both national and international TV as an advertising vehicle. And thus reduces the possible competetive influence on national economic activity. The reason for this is that the growing number of channels fragments the potential audience. That reduces the number of viewers which can be reached by a certain programme and makes it more difficult for advertisers to find their target groups. Transborder advertising will be especially difficult to use - and particularly expensive - when the target group is the population of small countries.

6.5. The amount of advertising received

Section 6.4 concerns the supply of cross border TV advertising. But the effect of this on national economic activity also of course depends on the demand side. How much of the cross border TV reaches - and will - reach the intended audience?

6.5.1. The legal situation

The reception of transborder TV advertising depends on the national legal demands to the relationship between advertising and broadcasting (e.g. advertising in blocks, between programmes, in programmes, sponsoring, ban of certain products) and on national legal demands to advertising codes of conduct. Without a standardisation of rules on those two issues cross border TV advertising will probably be very limited (see EEC 1984 for a detailed development).

6.5.2. Homes connected to cable

The consumption of cross border TV will to a large degree depend on the ratio of homes passed by and connected to cable (or having their own dish for DBS reception) and the capacity of those cables. This again will depend on national cable policies concerning the construction of cable nets and the services offered in these nets (TV and information services. (Notice that in the southern parts of Europe cable is practically unknown.) Finally the connection ratio will depend on the individuals need for more channels, especially transborder TV signals.

6.5.3. The need for more TV

Cabling in Europe has mainly been motivated by the need to supplement the one or two national channels with TV from neighbour countries. In the U.S. most people consume considerably more TV than is generally common in Europe today (A.C. Nielsen 1983). But the American figures also show that 10 channels probably are close to the upper limit that viewers are able to use on a regular basis (A.C. Nielsen 1983 and Nielsen 1982).
The influence of cross border TV advertising on national economic activity depends heavily on the number of channels the Europeans are willing to pay for. And to what extent they are willing to pay for TV with a foreign or international oregin. Also it is an open question what role the different languages will play. And to what extent this problem can be solved technically on an economically sound basis through subtitles and/or multi language sound, and as to advertising by giving priority to visual language (cf. table 11) and by screening cultural differences.

6.5.4. Exposure to commercials

It is self evident that to have an effect viewers must be exposed to the commercials in transborder TV (and there

must be a relation between this and buying behaviour). Nothing definite can be said in general about this exposure. However, a number of recent results indicate a growing audience resistence against commercial exposure.
Apparently the commercials do not carry enough value of any kind to attract the audience. This may always have been so but during the last years viewers have been given more and more alternatives in front of the screen. According to all forecasts the number of available TV channels will grow drastically in the near future. And more and more homes will be armed with a remote control. And a growing number of video recorders and home computers will circle around the TV set. Besides that an increasing number of homes will be able to switch to text-TV and video text.

The growing number of alternatives in front of the screen and the lack of interest in commercials will probably reduce the exposure to commercials on national channels. And the alternatives to commercials may be even more attractive if the commercials use a foreign language and have a limited information and entertaining value because they cannot use spoken language and must adapt to several different cultures.

To illustrate the obstacles that TV advertising is and will be up against - reducing its effects - some examples are given here on recent research on this issue.

Bunn 1982 summarizes British "presence research" results and reports a new study of his own from 1980 confirming the main results from the review of earlier research, i.e. that 88% of individuals measured as being viewers to the programmes on both sides of a commercial break are actually present in the "television viewing area" during the breaks, mostly independent of the time and type of programme.

In Italy recent research sponsored by the American advertising agency McCann Erickson and carried out by the

research institute Doxa showed that 35% of the viewers on the three public channels report that they do not watch the commercials. For viewers with remote controls the figure was 44%.
47% of the viewers on the private networks claim that they usually do not watch the commercials. For those equipped with remote controls the figure is 59%. (RAI Newsletter No. 6, December 1983.)

In Britain, European Market Surveys has made a survey for the advertising agency Norman, Craig & Kummel, showing that viewers with remote controls are three times more likely to change channels during commercial breaks than those without (Advertising Age, October 31, 1983.)

In American literature on the phenomena of avoiding the commercials, their is a growing number of empirical research on the socalled zapping problem. Below are some examples relevant to Europe because something like the "American situation" with regard to TV must develop on the European scene if any substantial influence from cross border advertising is to take place.

In Changing Channels 1984, Audits & Surveys Inc. reports the following:
If adults tuned to network TV during any part of a commercial break = 100%, then

39% in non-cable homes are not exposed to a commercial
45% in cable homes are not exposed to a commercial

The reason being that

29% in non-cable homes were not in the room
6% in non-cable homes switched channels
4% in non-cable homes turns the set off

and

30% in cable homes were not in the room
11% in cable homes switched channels
4% in cable homes turned the set off.

Those results are in the same line as an Advertising Age investigation showing that from 6% to 19% of all 60-90 seconds commercials are interrupted by viewers with remote controls and also showing that viewers typically switch to channels like Music Television and the Weather Channel (Advertising Age's Focus, April 1983).

It has also been demonstrated that video recorders are used to avoid commercials in the US. In a statement to the American Congress, the Motion Picture Association of the USA concluded that "time-shifting becomes a threat to commercial TV by interfering with viewing of time sensitive advertising and precluding advertisers from targeting audiences" (Beltramini, 1983.)

Fajan 1984 mentions a number of studies on zapping:
"The Newsweek Eyes on Study in 1978 revealed that only 67% of a program's viewers remained in the room at the commercial break. By 1980 this declined to 62%.
A 1979 A.C. Nielsen VCR study revealed that 50% of people taping an on-air programme did not eliminate commercials. By 1983 that figure had diminished to only 25%. Nielsen further disclosed that by 1983 fewer that one in ten viewers who viewed and taped a show actually witnessed the commercials a second time upon the programme's replay.
Two other studies from TV Audience Assessment and Ski Cable in 1982 and 1983 showed that 15% and 14% of the viewers respectively switched channels during commercial breaks.
A recent study from Information Resources Inc., showed that people zapped commercials 6% of the time. None of these later studies dealt with the number of people who left the room during a commercial break or paid any degree of attention."

In July 1984 at a symposium on commercial zapping in Chicago a General Food representative estimated that there would be a 30% audience loss due to "physical zapping (leaving the room), 13% audience loss from electronic zapping (using the remote control) and 4% audience loss as a result of vcr playback of programmes without commercials with a net result of an average prime time commercial audience of 53% by 1990." (Electronic Media, July 26, 1984, p 10).

6.6. Case: Danish viewing of West German TV

Some of the issues raised above are illuminated in a study carried out by Denmak's Radio on Danish viewing of West German TV in the first week of February, 1984 (cf. chapter 4 and Svendsen 1984a and 1984b).

30% of all Danish households were able to watch the three West German channels, either through cable or by air in the border regions.
The need for more TV is illustrated by the fact that in those households Danes used 35% more time on TV than those who only had access to Denmark's Radio's single channel.

Table 4 in chapter 4 shows the West German programmes seen by 10% or more. Table 4 illustrates an unambigious result of the study: the extra viewing time is used on fiction, entertainment/shows, and sport. 84% of the viewing time is used on those programme categories.
Figure 5 and 6 in chapter 4 indicates that only a small number of Danes are exposed to the West German programmes around the advertising blocks.

A little more than 1/3 of the Danish viewers of West German TV say they never or almost never experiences language problems. 2/3 do have such problems but they are to a certain degree willing to forget about them if the programmes are attractive. Those who report difficulties in understanding

German use 2.8 hours on West German TV per week whereas those reporting no language difficulties are exposed 9.1 hour or as much as they are exposed to Danish TV.

Probably the relevance of those figures will be limited in the future. West German TV presents more entertaining shows than Danish TV, but first and foremost it is composed by three diversified, public service channels with an obligation to objectiveness and presentation of all kinds of views. Most satellite channels will not have any public service obligations and will be more oriented toward music, films, sports and other forms of entertainment. And several will probably be single item channels. Also more Danes understand English than German.

Denmark's Radio also asked about the interest in more TV channels. The largest group wants another Danish channel. Then follows 45% who are to a certain degree interested in more foreign TV. Both groups are quite reluctant to pay more. Only 10-30% are very interested and willing to pay more.

6.7. Summary and conclusion

A negative influence from transborder TV advertising on national economic activity through competetive disadvantages is possible for companies that produce 1) branded consumer goods, 2) in the limited range of products that are heavily TV advertised, and 3) sold predominantly in the country under observation in competition with foreign/international brands.

This group of companies produces a very concentrated range of products responsible for a relativly small share of consumer expenses.

The effect of transborder TV advertising depends on the internationalization of brands.

The influence of transborder TV advertising depends on the amount of this advertising which is difficult to predict. Many cross border channels are on their way. However, it is uncertain whether there will be enough advertising on those channels to influence competition in individual countries - or to keep all channels alive.

Given the amount of advertising, its effect will be reduced by the growth in audience fragmentation which almost automatically follows the growth in available channels.

Any supply of transborder TV advertising will continue to exists only, if advertisers can register an effect. One condition for an effect is audience exposure. That exposure will depend on a number of different factors:

- The legal situation as to reception of foreign TV and regulation of TV commercials.
- Development of cable nets and their capacity.
- Household willingness to connect to cable nets and to pay the necessary cost.
- The need of the audiences for more (transnational) TV.
- The importance of language problems and the possibilities for solving those problems.

If those determinants work in a positive way for consumption of transnational TV, the advertising still has to be seen.
The exposure to commercials will be limited by the electronic dilemma of advertising (more channels, pay TV, and more electronical devices make it easier for the audience to avoid commercials), by the foreign languages, and by the lack of interest for a limited range of low involvement and low interest products.

It is difficult to conclude from the above about what has here been called the competition argument.
But at least this much can be said:

An influence on national competition with negative effects for national economic activity from transborder TV advertising is not likely in the nearest future and will even in the long run most probably be very restricted.

In conclusion the competition argument is not an argument for introduction of TV advertising in those countries where it is not found today. And it is not an argument for liberalization of the rules for TV advertising in those countries where TV advertising is legally restricted in different ways today.

7. TV ADVERTISING AND THE CONSUMER

7.1. Spot length

It is not possible to demonstrate a relationship between the size of print advertising and information content (Sepstrup 1980). However, it seems reasonable to imagine a minimum length for a TV commercial to include informational cues and to assume some relation between the number of seconds a commercial runs and the information content.
The frequency of spot length on Sky Channel and ZDF is shown in table 10.

Table 10:

Spot length. Sky Channel February, March, and April 1984. ZDF week 15, 1984.

Spot length Seconds	Number of spots Sky Channel[1]	ZDF	% of spots Sky Channel	ZDF
10		2		1
15	27	47	5	15
20	96	118	19	38
30	361	122	72	39
40		16		5
50	21	3	4	1
60		2		1
Total	505	310		

1: 267 10-second spots for Omega giving the time on Omega logo are not included in the analysis. Also one commercial which was not intended for consumers is excluded.
Sources: Sky Channel's transmission logs, submitted by Sky Channel and content analysis of all ZDF commercials week 15.

30-second spots dominate on Sky Channel as they have done on American and British TV since the early seventies. Currently it is discussed in the US. to give priority to what is called split-run 15-second commercials instead. And more and more professionals point to a reduction of spot length as an answer to zapping.

German advertisers seem to be ahead of their English speaking counterparts in the move toward shorter commercials. Compared to Sky Channel ZDF has three times as many 15-second spots and twice as many 20-second spots. The average spot length is 24 and 28 seconds, respectively. This may reflect differences in advertising strategy, but also the West Germany booking system in conjunction with the limited amount of commercial time.

Unfortunately the data in this study are too few to tell whether spot length correlates with information content (e.g. at least product category must be held constant). Other things being equal there should be such a correlattion. But generally there is so little information in TV advertising (see table 13 and 14) that it is difficult to imagine significant variations. Also West German TV advertising is not less informative than the Sky Channel commercials on an average (see table 13).

7.2. Language and understanding

It is of special interest in the new situation of international satellite television whether the understanding of commercials depends on spoken or written language. The languages of the commercials on Sky Channel are found in table 11.

Table 11:

Language of commercials. Sky Channel February, March, and April 1984.

Language	Number of commercials	% of commercials
English	465	92
Norwegian (sung)	19	4
No language	21	4
Total	505	100

88 or 17% of the commercials have a Danish text on the packaging. 40 or 8% carry a short Norwegian subtitle.

It is not surprising that English dominates since most advertisers are American or British and English the most widely understood language in Europe. Also Sky Channel did not want to provoke any national authorities by directing any messages toward specific nations.
Neither is it surprising that all commercials on ZDF are in German. ZDF is a purely national channel and the West Germans are used to synchronization of all foreign language programmes.

92% of the Sky Channel commercials use spoken English. However, it cannot be taken for granted that understanding of English is necessary in order to understand the basic message of the commercials. It would require further research to solve that problem. But as part of the content analysis each commercial was "asked": "Does the understanding of the commercial depend on the understanding of the language?", cf. item 53 in the coding scheme.
The answers to this question may not be as reliable as desirable. They are reported here to give a first tentative insight in this important question for international advertising. See table 12.

Table 12:

"Does the understanding of the commercial depend on the understanding of the written or spoken language?"

	Number of spots		% of spots	
	Sky Channel	ZDF	Sky Channel	ZDF
Yes	179	113	35	37
No	325	159	65	51
Uncertain	0	38	0	12
Total	505	310	100	100

Table 12 indicates the possibility that a majority of TV commercials are able to communicate the basic message independent of the spoken language: e.g the existence of the

brand, the name, basic product features, the associations of images and lifestyles the seller wants the consumer to experience. The similarity between the two channels supports this conclusion, but probably also reflects the fact that advertising is a very international profession and U.S. dominated.

Some specific elements of information are available only through the spoken language. "No" in table 12 means that spoken information is essential for the understanding of the message. One reason for the relatively low dependence on language may be the few elements of specific product information in the commercials.

Altogether the findings indicate that the language does not seem to be a major obstacle to a pay off for advertisers from crossborder TV advertising.

7.3. The information content of TV advertising

The content analysis of commercials on Sky Channel and ZDF includes 24 informational cues (item 9-31) elected for three reasons:

1) to represent all aspects of the consumer's interest in advertising, i.e. a convenient way to be informed about the market. The relevance of the individual cues depends on the product and the buying situation.

2) to produce results comparable with similar studies of TV commercials (see 7.4.1.).

3) to produce results comparable with the results from similar studies of print advertising (see 7.4.2.).

7.3.1. Sky Channel

The results of the content analysis are shown in table 13.

Six of the 24 information cues were found in the commercials shown on Sky Channel during the three months of February, March, and April, 1984:

- 100% of the commercials mentioned the name of the advertised brand which of course is a must for the advertiser to communicate.
- 96% of the commercials showed the product or the packaging.
- 37% gave the (official) name of the company behind the brand.
- 22% of the commercials mentioned varieties of the brand, e.g. different tastes or sizes.
- 2% told about the quantity of the product.
- 54% of the commercials gave measurable and controllable characteristics of the product like "made with peanut butter", "grains of wheat", "flakes of corn", "contains witamins", "sugar free", "it never sticks".

Besides identifying tne brand the commercials carried information in a noticeable way on three cues: name of supplier (37%), varieties of the brand (22%), and other measurable and controllable characteristics (54%). The last two cues only are relevant to the normal buing situation.

7.3.2. ZDF

The result of the content analysis is shown in table 13. 14 of the 24 information cues were found in the commercials shown on ZDF in week 15, 1984:

- 97% of the commercials mentioned the name of the advertised product. The remaining 3% were commercials for either retailers or for products as such.
- 97% of the commercials showed the product. 4/5 of the last 3% were for "insurance and banking", the remaining 1/4 for "personal care".
- 58% gave the (official) name of the company behind the brand.
- 2% told the price of the product.
- 29% mentioned varieties of the brand.
- 16% mentioned the quantity of the product.
- 3% invited the consumers to obtain further information.
- 26% gave instructions for use.
- 22% of the commercials gave other measurable and controlable characteristics of the product like "enthalt pflanzliche Farbestoffe", "enthalt B-vitamin", "mit Fluor", "ohne Konservierungsstoffe", "enthalt Milch und Hassenüsse".
- 6% told where to buy the product.
- 1% told about each of the following cues: safety warnings, special offers, taste, and nutrition.

Table 13:

The information content of TV advertising. Sky Channel (SC) in February. March, and April 1984. ZDF week 15 1984.

Question N = 505 N = 310	Yes				No				Uncertain			
	Number of commercials		% of commercials		Number of commercials		% of commercials		Number of commercials		% of commercials	
	SC	ZDF	SC	ZDF	SC	ZDF	SC	ZDF	SC	ZDF	SC	ZDF
1: Does the commercial carry a brand name?	505	302	100	97	0	8	0	3	0	0	0	0
2: Does the commercial show/describe the product?	483	299	96	97	22	11	4	4	0	0	0	0
3: Does the commercial mention the name of the company behind the brand?	189	179	37	58	316	125	63	40	0	6	0	2
4: Does the commercial quote the price?	0	7	0	2	505	302	100	98	0	1	0	0
5: Does the commercial mention varieties of the product?	109	91	22	29	396	212	78	69	0	7	0	2
6: Does the commercial quote quantity/size?	12	50	2	16	493	260	98	84	0	0	0	0
7: Does the commercial invite the consumer to obtain further information?	0	10	0	3	505	300	100	97	0	0	0	0
8: Does the commercial mention instructions for use?	0	80	0	26	505	225	100	73	0	5	0	1
9: Does the commercial give other characteristics of the product?	272	68	54	22	233	241	46	78	0	1	0	0
10: Does the commercial mention guarantee terms?	0	2	0	0	505	308	100	100	0	0	0	0
11: Does the commercial mention hire purchase terms?	0	0	0	0	505	310	100	100	0	0	0	0
12: Does the commercial mention rigths of cancellation?	0	0	0	0	505	310	100	100	0	0	0	0
13: Does the commercial invite the consumer to make comparisons?	0	1	0	0	505	309	100	100	0	2	0	0
14: Does the commercial mention keeping quality, durability?	0	0	0	0	505	310	100	100	0	0	0	0
15: Does the commercial quote an informative label?	0	0	0	0	505	310	100	100	0	0	0	0
16: Does the commercial give safety warnings?	0	3	0	1	505	307	100	99	0	0	0	0
17: Does the commercial ask the consumer to consider whether he/she can afford the commodity?	0	0	0	0	505	310	100	100	0	0	0	0
18: Does the commercial tell where to buy the product?	0	19	0	6	505	291	100	94	0	0	0	0
19: Does the commercial tell about special offers?	0	5	0	1	505	305	100	99	0	0	0	0
20: Does the commercial tell about the taste?	0	5	0	1	505	305	100	99	0	0	0	0
21: Does the commercial tell about nutrition?	0	4	0	1	505	306	100	99	0	0	0	0
22: Does the commercial tell about independent research?	0	2	0	0	505	308	100	100	0	0	0	0
23: Does the commercial tell about company-sponsored research?	0	0	0	0	505	310	100	100	0	0	0	0
24: Does the commercial tell about new ideas?	0	1	0	0	505	309	100	100	0	0	0	0

Besides identifying the product, the commercials on ZDF carried information in a noticeable way on 5 cues: the name of the supplier (58%), varieties of the product (29%), quantity of the product (16%), instructions for use (26%), and other measurable and controllable characteristics (22%). The last four cues are relevant to the normal buying situation.

It is near at hand to assume a relationsship between product category and information content of the commercials because more information cues may be relevant for some products than for others. Unfortunately the number of Sky Channel commercials is too small for an analysis of this issue. The assumption is investigated for the ZDF commercials in table 14 for five product categories covering 71% of all spots in week 15, 1984, cf. table 7 , chapter 5.

Five information cues in table 14 are present in a volume making comparisons relevant, not including brand name and showing of the product since the percentages for those two cues are the same for all product categories. See table 15.

There are no unambiguous differences in table 15 except that "sweets" are lowest on all cues. The presence of an information cue seems to depend at least on both the kind of information and the product.
This remembered, the comparison of product categories in table 15 is made easier by calculating an expression for the information content of commercials for each product category. $\overline{X}5$ is the average percentages of spots in which a cue appears. As the company name is of limited interest for daily purposes $\overline{X}4$ has been calculated as the average percentage of spots in which a cue appears (excluding company name). The numbers in the brackets after the averages indicate the ranking order of the product group as to information content.

It is surprising that commercials for "cleaning and washing" and "personal care" carry more information than "Durables

Table 14:

The information content of TV advertising for five product categories. Number and percent of spots with the information cue. ZDF, week 15, 1984

Information cues	All		6. Durables for home garden		8. Chocolate, sweets, gum		13. Food products		17. Cleaning and washing		20. Personal care and hygiene	
	%	n	%	n	%	n	%	n	%	n	%	
1: Brand name	97	29	100	28	100	66	97	35	100	62	100	
2: Show product	97	29	100	28	100	68	100	35	100	60	97	
3: Company name	58	24	83	5	18	47	69	15	43	34	55	
4: Price	2	2	7	0	0	0	0	0	0	0	0	
5: Varieties	29	6	21	3	11	26	38	4	11	24	39	
6: Quantity/size	16	5	17	4	14	27	40	5	14	4	6	
7: Further information	3	0	0	0	0	1	1	0	0	1	1	
8: Instructions for use	26	8	28	0	0	14	21	20	57	23	37	
9: Other characteristics	22	8	28	6	21	10	15	13	37	24	39	
10: Guarantee terms	0	0	0	0	0	0	0	2	6	0	0	
11: Hire purchase terms	0	0	0	0	0	0	0	0	0	0	0	
12: Rights of cancellation	0	0	0	0	0	0	0	0	0	0	0	
13: Invitation to comparisons	0	0	0	0	0	1	1	0	0	0	0	
14: Durability	0	0	0	0	0	0	0	0	0	0	0	
15: Informative label	0	0	0	0	0	0	0	0	0	0	0	
16: Safety warnings	1	0	0	0	0	0	0	0	0	3	5	
17: Afford commodity	0	0	0	0	0	0	0	0	0	0	0	
18: Where to buy	6	1	3	0	0	4	6	0	0	4	6	
19: Special offers	1	0	0	0	0	0	0	1	3	0	0	
20: Taste	1	0	0	0	0	3	4	0	0	0	0	
21: Nutrition	1	0	0	0	0	1	1	0	0	3	5	
22: Independent research	0	0	0	0	0	0	0	2	6	0	0	
23: Company-sponsored research	0	0	0	0	0	0	0	0	0	1	2	
24: New ideas	0	0	0	0	0	0	0	0	0	0	0	
N	310	29		28		68		35		62		
Percentage of commercials	100		9		9		22		11		20	

Table 15:

Share of spots for different product categories with five information cues. ZDF, week 15, 1984

Information cue	All products	6: Durables for home and garden	8: Sweets, chocolate, gum	13: Food	14: Cleaning and washing	15: Personal care
	%	%	%	%	%	%
Company name	58	83	18	69	43	55
Varieties of brand	29	21	11	38	11	39
Quality, size	16	17	14	40	14	6
Instructions for use	26	28	0	21	57	37
Other characteristics	22	28	21	15	37	39
$\bar{X}5$	30 (4)	35 (2a)	13 (5)	37 (1)	32 (3)	35 (26)
$\bar{X}4$	23 (4)	24 (3)	12 (5)	29 (2)	30 (1a)	30 (16)

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for home and garden". Surprising because one would expect durable products to be more important to consumers than inexpensive non-durables with a high buying frequence, and because there should be more to say about durables than non-durables.
One possible explanation of the findings is that durables are so important and complicated products that 20 or 30 seconds can only be used for communication of the existence of the product and image building. Further "cleaning" and "personal care" are also important in some senses and the information is so simple that it can be communicated in a TV spot together with image building.
This said it should also be noted that no easy and certain interpretation of table 15 is possible. The detailed picture is rather confusing, the differences between the averages are relatively small ("Sweets" being an exception), the number of information cues are limited, and each cue appears on the average in no more than 1/3 of the commercials.
Therefore, another possible interpretation (not completely excluding the above) is that the nature of TV advertising as such (e.g. giving priority to entertaining value and image building) is stronger that the border lines between product categories which are normally used when analysing consumer behaviour.

7.3.3. Sky Channel versus ZDF

The commercials on Sky Channel and ZDF can be compared in table 13 on a cue to cu basis. ZDF has the largest percentages for all cues except "other characteristics" and more cues are represented though with very small percentages. One possible explanation is that commercials for "sweets" - lowest on information content in table 14 - take up 58% of the commercial time on Sky Channel. See also table 16 comparing Sky Channel and ZDF on the five most communicated information cues from table 13 and including "sweets" from table 14.

Table 16:

Share of spots with five informations cues. Sky Channel February, March, and April 1984 and ZDF, week 15, 1984

Information cue	All products Sky Channel	All products ZDF	Sweets ZDF
	%	%	%
Company name	37	58	18
Varieties of brand	22	29	11
Quantity, size	2	16	14
Instructions for use	0	26	0
Other characteristics[1)]	54	22	21
$\bar{X}5$	23	30	13
$\bar{X}4$	20	23	12

1): The difference between Sky Channel and ZDF on this cue is so large that the author (coding the Sky Channel commercials) also went through the ZDF commercials to code this cue. The result became 28% corresponding to differences on 29 commercials or a very simple reliability coefficient on 91.)

Calculation of $\bar{X}4$ and $\bar{X}5$ (see above) clearly demonstrates the difference between the information content on Sky Channel and ZDF on an average. The difference can be explained by the very few brands and product categories advertised on Sky Channel and the dominant position of commercials for "sweets" assuming that those commercials carry as little information on Sky Channel as on ZDF.

Of course this explanation does not mean that the consumer view is indifferent toward the two channels. From the consumer point of view it is the combination of products, brands and information content which is interesting. In principle therefore the commercial time on ZDF as a whole is preferable to the commercial time on Sky Channel from a consumer point of view when comparing the three months and the one week in 1984.

7.4. Comparison with other studies

7.4.1. TV advertising

Stern and Resnik 1977 reports the results of an investigation of fourteen "evaluative criteria reflecting product characteristics" by asking "Does this advertisement communicate any of the following cues about the product, service, or institution?". The definition of the fourteen cues can be found in Stern, Resnik, and Grubb 1977 (and Stern, Krugman, and Resnik 1981). The study of Sky Channel and ZDF includes seven of Stern and Resnik's information cues as named and defined by Stern and Resnik (item 24-31 in the coding scheme, cf. annex 1). The remaining seven of Stern and Resnik's fourteen cues are included among the cues taken from Sepstrup 1981.

Stern and Resnik analysed a sample from 1977 of 378 different commercials from the three major US networks. They do not use the "exposure principle" but analyse different commercials. Stern and Resnik defines a commercial as "informative" if it communicated one of the fourteen informational cues.

It is possible to analyse the results from the content analysis of Sky Channel and ZDF following the same procedure as Stern and Resnik.

Stern and Resnik found that 49.2% of the commercials in their study were "informative". Following their procedure 50% of the Sky Channel commercials and 39% of the ZDF commercials are "informative". The similarity of the results is remarkable. The difference between the ZDF study and the two other studies reflects the sensitiveness of the Stern and Resnik procedure to the definition of "informativeness" and gives no reason to alter the conclusion in section 7.3.3. that the ZDF commercials as a whole contains more information than the Sky Channel commercials, cf. table 13 showing that ZDF has the largest percentages for all cues except one.

Dowling 1980 replicates the Stern and Resnik study on a sample of 163 different Australian TV commercials from 1978 showing a ratio of 74% "informative" commercials. Dowling explains the difference as a consequence of different traditions in Australia and the US for government regulation and self regulation of advertising content.

Reid and Rotfeld report another replication of the Stern and Resnik study on a sample of 324 different Saturday morning commercials, finding 42.3% "informative". Reid and Rotfeld were especially interested in Stern, Resnik, and Grubb, 1977's finding that commercials during children's hours (Saturday Morning Show) were less informative than the average (34.9%). Reid and Rotfeld find no statistical significant difference between the two findings for children's television.

Aaker and Noris 1982 reports a study of perceived informativeness of prime time television commercials in the US based on the Bruzzone Research Company's mail questionnaire tests of television commercials. Aaker and Noris found that when 500 respondents evaluated 524 prime time commercials an average of 18% of the respondents perceived a commercial as informative. The corresponding figures for food products and beverages were 13.6% and 9.8%, respectively.
The Aaker and Noris study is interesting but as it was based on subjective perceptions of informativeness the results cannot be compared with results from content analysis.

Pollay, Zaichowsky, and Fryer, 1980 used a modified version of the Stern and Resnik measurement of informativeness. They studied a sample of 615 different US and Canadian TV commercials from April 1977. On an average 84% of the commercials were judged "informative". Pollay 1984 explains the difference to the other studies reported here with the expansion of the criteria list (the number of informations cues) by five additional dimensions. One of these dimensions - varieties of the product - is included in the study of Sky Channel and

ZDF (however, omitted in the comparison with the Stern and Resnik study above). It appears in 22% of the Sky Channel and 29% of the ZDF commercials indicating that their "informativeness rating" also would be higher if applying the Pollay et al, 1980 procedure.

7.4.2. Print advertising

The research of information in print advertising includes parallels to the Aaker and Norris study as represented e.g. by the classic study reported in Bauer and Greyser 1968 reporting that 6% of print advertisements were judged as informative by a sampel of consumer.

The line of research relevant here is the studies using content analysis. However, the number of such studies is very limited.

Using the Stern and Resnik procedure Laczniak 1979 found that 92% of a sample of 380 different magazine advertisements were "informative". Nearly half of the sample had information on three or more of the fourteen cues.

Stern, Krugman, and Resnik, 1981 reports on an analysis of a sample of 1500 different advertisements from 100 different magazines from February 1978. They found 86% "informative". 26% had information on three or more cues.

Pollay 1984 adpoted 12 of the Stern and Resnik cues and added four more. Using a sample of 2000 different magazine advertisements spanning the twentieth century up to this date Pollay found that 92% of the advertisements reflected more than one informative cue. 78% of the sample were judged informative along three or more dimension. The figures are not reported for each decade and therefore represents the whole period. However, Pollay 1984 states that the advertisements after the 1960s are less informative than earlier advertisements.

If one compares the study of Sky Channel, ZDF and the studies of informations content in TV advertising referred to above with the studies of print advertising also referred to above - it is evident that when using the rather arbitrary Stern and Resnik measurement of informativeness there is no doubt that print advertising is considerably more informative than TV advertising. For further discussion see section 7.4.

It is also possible to compare the study of information content in commercials on Sky Channel and ZDF with studies of information content of print advertising reporting the information content as in table 13. However, the number of relevant studies making this possible is very limited.
The results in table 13 are based on the exposure principle. To use all sources the results of the content analysis of Sky Channel and ZDF have also been calculated on the basis of different commercials (cf. chapter 2) and the background material in Stern, Krugman, and Resnik, 1981 has been systematized according to the information cues used in this study. (Unfortunately this is not possible from Laczniak 1979 and Pollay 1984.)
The result is found in table 17 which also includes a Danish study of print advertising. Comments to table 17 are found in section 7.5.

7.5. Discussion and conclusion

It is a subjective decision depending on the point of view which cues to include from table 13 in a fair judgement of the information content af TV advertising. Other cues may also be relevant and from a practical point of view it must depend on the product category under consideration.

The most common measure in the international literature - cf. Stern and Resnik 1977 - includes 12 of the 24 information cues in table 13. The Stern and Resnik measure of evaluating information content has never been discussed nor

Table 17

Information content in TV advertising and print advertising (0)

Information cues (1)	% of different commercials that cue appeared in		US. Magazines 1978. % of different commercials that cue appeared in (2)	US. Magazines 1970s. % of different commercials that cue appeared in (3)	% of commercials according to exposure principle that cue appeared in (4)		Danish newspapers 1978. % of ads according to exposure principle that cue appeared in (5)	Danish magazines 1978. % of ads according to exposure principle that cue appeared in (5)
	SC	ZDF			SC	ZDF		
1: Brand name	100	96	-	-	100	97	-	-
2: Product shown	100	97	-	-	100	97	59	90
3: Name of company	22	56	-	-	37	58	43	45
4: Price	0	2	37	31	0	2	54	35
5: Product variations	11	28	-	50	22	29	42	48
6: Quantity/size	0	15	-	-	2	16	32	41
7: Further information	0	3	-	-	0	3	13	24
8: Instructions for use	0	26	-	27	0	26	5	24
9: Other characteristics of product	50	22	43-15-1 (2a)	48-62-40 (13a)	54	22	6	12
10: Guarentees	0	1	11	9	0	0	6	8
11: Hire purchase terms	0	0	-	-	0	0	4	2
12: Rights of cancellation	0	0	-	-	0	0	3	4
13: Invite to comparations	0	0	-	-	0	0	2	5
14: Keeping quality/durability	0	0	-	-	0	0	1	3
15: Quotation of informative label	0	0	-	-	0	0	1	4
16: Safety warnings	0	1	< 1	2	0	1	1	1
17: Consider to afford	0	0	-	-	0	0	0	0
18: Where to buy	0	7	36	37	0	6	-	-
19: Special offers	0	2	26	-	0	1	-	-
20: Taste	0	2	< 1	-	0	1	-	-
21: Nutrition	0	2	< 1	3	0	1	-	-
22: Independent research	0	1	< 1	-	0	0	-	-
23: Company-sponsored research	0	0	< 1	3	0	0	-	-
24: New ideas	0	0	< 1	-	0	0	-	-
Number of different commercials	18	246	1500	250				
Number of commercials					505	310		
Number of commercials							1,912	2,140

(0): There are other reports on information content in advertising than the ones included here, but they either involve few information dimensions or concentrate on one or very few products only, see e.g. Nowak and Andrén 1981, Gottschalck, 1981, Marquez 1977, Kassarjian 1977, or have been reproduced later in a larger scale by the Resnik et al and Pollay studies as is the case with Laczniak 1979.

(1): The information cues are spelled out in table 13 and annex 1. The definitions are found in annex 2 and the works from where the data are taken.

(2): Stern, Krugman and Resnik, 1981. Figures for information cues comparable with the definitions used in the study of Sky Channel. Note that Stern et al seem to have used the criteria in a somewhat stricter sense than in this study. The definitions are the same as in Resnik and Stern 1977, but the study cannot be included in this cue by cue comparison since the results from this study have never been published for the separate cues.

(2a): Stern et al separates "components or contents" (43%), "performance" (15%), and "quality" (1%), which are all in cue 9 in this study. "Quality" includes "durability" which is here separated in cue 14.

(3): Pollay 1984. Pollay's content analysis uses the Resnik and Stern 1977 cues. Pollay does not include "taste", "inuependent research", "new idea", and "special offers", and have added "product variations" which are comparable to cues 5 in this study. Pollay slightly redefines the information cues compared to Resnik and Stern 1977 making the criteria for the precense of information cues somewhat less restrictive.

(3a): Se (2a).

(4): Se table 13.

(5): Sepatrup 1980, 1981, The results are based on samples according to the exposure principle and representing one year of print advertising.

SC = Sky Channel

critizised. Maybe there is no better way to compress the evaluation of information content in a single measure. However, this does not automatically mean it is a perfect or even relevant measure.
The Stern and Resnik measure is very arbitrary and of little informative value when evaluating advertising's potential usefulness to consumers. The definition of "informative" is arbitrary and the selection of cues is arbitrary. Also the very strict definitions applied in Stern and Resnik 1977 may seem unrealistic even from a consumer point of view.
The Stern and Resnik measure is operational and easy to communicate. But for most purposes more insight is given into the informative character of advertising when the findings are listed as in table 13 and when as many relevant cues as possible - in this study 24 - are included. The description in table 13 tells what kind of information is included and what is not disseminated by TV advertising. The list of cues in this study is not perfect. However, this is easy to change in other studies. The basic issue is the way information content is reported combined with the cues applied.

One disadvantage of using the method of this study - shared with the Stern and Resnik procedure - is the lack of a means to unobjectionably define what constitutes a high or low information content. Any evaluation of the information content from listings as used here depends on the type of information one may have in mind and on the prior expectations of the person evaluating the information content. Table 13 and 17 describe facts - as far as this is possible through content analysis - but it is not possible along objective guidelines to establish whether the commercials on Sky Channel and ZDF have a high or low content of information. And it is difficult to overlook and assess this kind of listing the results. Still, this situation may be preferable to throwing away the differentiated information on the information content in table 13 and 17 for the sake of one - arbitrary - measure.

It is a fact that there is no objective measure to tell whether the advertising described in this study is very informative, informative or hardly informative. This said the facts concerning the information content of commercials on Sky Channel and ZDF build up such a unambiguous picture that it is not so difficult in practice to reach some conclusion acceptable to most observers:

From an overall general consumer view point TV advertising has limited value since information relevant for normal purchasing decisions is not communicated to a degree that would seem to have any practical significance for consumers.

Though the above conclusion is interesting as such the main issue of this study is not in an absolute way to evaluate the information content but to assess whether a transfer of advertising money from print advertising to TV advertising will be an advantage or disadvantage for the consumer trying to make the best buy from his or her subjective standpoint. And to try to evaluate the consequences for consumers of a growth in transborder TV advertising.

In section 7.4.2. it was shown that the literature using the Stern and Resnik measure clearly demonstrates that print advertising is more informative than TV advertising.
Table 17 supplements this conclusion with a possibility of comparing the information content of print advertising and TV advertising on a cue by cue basis.

In the first three columns in table 17 (where the population is defined as different commercials or advertisements) printed advertising comes out superior to TV advertising in all the cases where it is possible to compare the percentages of advertisements in which a cue appears.
The same is true if TV advertising and print advertising are compared in the last three columns in table 16 using the exposure principle. Cue 2, 3, 8 (compared to ZDF only), and 9

are exceptions though. However, only cue 8 and 9 are relevant for normal buying decisions. The relatively superiority of TV advertising on "instructions for use" is very understandable. The kind of information registered under cue 9 is exemplified in section 7.3.1. and 7.3.2.

Considering all available research the overall conclusion is that <u>from a consumer point of view the information content of print advertising is celarly superior to that of TV advertising</u>.

It follows from this conclusion that from a consumer point of view there is very little or no advantage from financing the satellite and other transborder TV channels by advertising.And it is a clear disadvantage from the consumer point of view if the financing of transborder TV transfers advertising money from print to TV advertising. And - still from the consumer point of view - it is an outright step backward if TV advertising is introduced in countries where it is not found today. Or if TV advertising is expanded in countries now limiting TV advertising in different ways.

Therefore "only" three issues are left to consider in an evaluation of the attractiveness of more transborder TV financed by advertising: the influence on programming from advertising, the counterbalancing of the price paid as consumers with the potential added value obtained in our role as viewers and the concequences for national public broadcast organizations. That however is outside the scope of this study.

8. SUMMARY AND CONCLUSIONS

The main purpose of the study (cf. chapter 1) is to furnish some facts to the discussion of the economic consequences of transborder TV advertising in Europe by 1) analysing the competitive consequences of transnational advertising on national economic activity and 2) investigating the consequences for the citizens in their roles as consumers of goods and services if TV advertising grows or is introduced in a country.
The empirical background for 1) and 2) are a) a description of Sky Channel and the viewing of West German TV commercials in Denmark, b) a registration and description of the kind and amount of advertising on Sky Channel and ZDF for three months and one week in 1984, respectively, and c) an analysis of the information content of the commercials.

The methodology of the study is discussed in chapter 2. All commercials on Sky Channel and ZDF in the periods studied have been content analysed using a procedure replicating the method described in Sepstrup 1981. New dimensions have been added to the content analysis to make it comparable with as many other relevant studies as possible. For the same reason the results have been calculated according to both what is called the production principle and the exposure principle.

Sky Channel is briefly introduced in chapter 3 describing the history, audience, advertising and programming.

The basis structure of West German TV and the fundamental rules for TV advertising in West Germany are found in chapter 4 which also analyses the exposure in Denmark to West German TV in general and the exposure to programmes carrying commercials in detail. During one week 15 programmes on the three West German channels together attracted 10% or more of the 1/3 of Danish viewers who had the technical possibility of watching West German television. On an average around 3% of the Danish viewers are exposed to the programmes around the commercials.

The results from chapter 5 on the kind and amount of international advertising (as exemplified by ZDF and Sky Channel) are important for the analysis of the potential competitive influence of transnational advertising.
During three months Sky Channel had commercials for 18 consumer brands representing 12 different companies. Two product groups - "sweets" and "food products" took up 76% of the commercial time.
ZDF had commercials for 246 different brands during one week. Three product categories dominate. 22% of the commercial time are used on "personal care", 17% on "food products" and 13% on "cleaning and washing".

In general the dominant products on both Sky Channel and ZDF are non-durable, uncomplicated, low involvement products in areas with a rich supply of brands, which are functionally very much alike. Such brands need to differentiate themselves. TV advertising can do this by building up brand images.
When comparing product categories' share of time on Sky Channel and ZDF with the same product categories' share of the average household budgets it is remarkable how consumers are "overinformed" by TV advertising on certain products.

Chapter 6 analyses the socalled competition argument stating that transborder TV advertising may cause a competitive disadvantage for local or national brands which cannot on an economically sound basis use satellite or neighbour country advertising. A number of factors on which the competitive influence depends are discussed. The sectors of the economy for which the competition argument is valid are narrowed down and specified through a discussion of 1) how different sectores are affected, 2) the kind of products advertised on TV, and 3) the ratio of international brands in transnational TV advertising as exemplified by Sky Channel, ZDF and Denmark.
Other factors discussed are the amount of advertising supplied and received in the future. Important determinants of the future reception of transnational television are the legal

situation, homes connected to cable, the need for more TV and the exposure to commercials. The concept of the electronic dilemma of advertising is developed to understand the last variable.
The partial analyses are summed up in this way:
An influence on national competition with negative effects for national economic activity from transborder TV advertising is not likely in the nearest future and will probably even in the long run be very restricted. Therefore the competition argument is not an argument for introduction of TV advertising in the countries where TV advertising is legally restricted in different ways today.

The information content in TV advertising is reported in detail in chapter 7. The literature on content analysis of information in TV advertising and print advertising is reviewed and the results compared to the results of this study.
The chapter describes the "absolute" information content of Sky Channel and ZDF commercials. However, it follows from the purpose of the study that a comparison of TV advertising and print advertising is especially important since it is a growth of TV advertising and a potential transition from TV to print which is under study.
By applying two different measures earlier studies are used to compare print and TV advertising. And by applying two different procedures the study of Sky Channel and ZDF is compared to studies of print advertising.
The results of all comparisons are unambiguous:
Considering all available research the overall conclusion is that there is more information relevant to consumers in print advertising than in TV advertising.
It follows from this conclusion that from a consumer point of view there is little or no advantage by financing the satellite and other transborder TV channels with advertising. And it is a disadvantage from the consumer point of view if the financing of transborder TV transfers money from print to TV advertising. And - still from the consumer point of view - it is an outright

step backward if TV advertising is introduced in countries where it is not found today. Or if TV advertising is expanded in countries now limiting TV advertising in different ways.

Commercial No:_____

Exact brand and/or product and/or other name:_____

_____

1. STV.....1
   NDR.....2 go to 3

2. February.....1
   March.....2
   April.....3

3. Length of commercial.....1o seconds.....1
   15 -.....2
   2o -.....3
   3o -.....4
   4o -.....5
   5o -.....6
   6o -.....7
   > 6o -.....8 Exact length:_____

4. Language of commercial..... English.....1
   German.....2
   Norwegian.....3
   French.....4
   Italian.....5
   Finnish.....6
   No spoken language.....7
   Other_____ ...8

5. Product

Cars.....1
Boats.....2
Women's clothing.....3
Men's.....4
Children's -.....5
Durables for home & garden.....6
Books, magazines, newspapers.....7
Chocolate, sweets, gum.....8
Wine.....9
Liquor.....1o
Beer.....11
Soft Drinks.....12
Food products.....13
Pet food.....14
Foto and film.....15
Toys.....16
Cleaning, washing.....17
Gas, oil 18
Tobacco, cigarettes.....19
Personal care, hygiene.....2o
Watches, jewelry, glasses.....21
Insurance, banking.....22
Public announcements.....23
Travelling.....24
Other:_____.....25

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Describe briefly what goes on in the commercial/ the plot/ the content/: .....

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Sex roles:.....

Family pattern:.....

Humor:.....

Values:.....

Spectacular effects:.....

Special characteristics:.....

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Quote the outspoken arguments for using the product:

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Quote other essential outspoken arguments:

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.....

	No	1: yes	2: no	3: unc.
Does the commercial carry a brand name?	6	:8		
Is the advertiser a retailer or retail chain?	7			
Is the advertiser a public organization?	8			
Does the commercial show/describe the product?	9			
Does the commercial mention the name of the company behind the brand?	1o			
Does the commercial quote the price?	11			
Does the commercial mention varieties of the product?	12			
Does the commercial quote quantity/size?	13			
Does the commercial invite the consumer to obtain further information?	14			
Does the commercial mention instructions for use?	15			
Does the commercial give other characteristics of the product?	16			
Does the commercial mention guarantee terms?	17			
Does the commercial mention hire purchase terms?	18			
Does the commercial mention rights of cancellation?	19			
Does the commercial invite the consumer to make comparison	2o			
Does the commercial mention keeping quality, durability	21			

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	No	1: yes	2: no	3: unc.
Does the commercial quote an informative label?	22			
Does the commercial give safety warnings?	23			
Does the commercial ask the comsumer to consider wether he/she can afford the commodity?	24			
Does the commercial tell where to buy the product?	25			
Does the commercial tell about special offers?	26			
Does the commercial tell about taste?	27			
Does the commercial tell about nutrition?	28			
Does the commercial tell about independent research?	29			
Does the commercial telle about company-sponsored research?	3o			
Does the commercial tell about new ideas?	31			
Does the commercial use "scientific" proofs or arguments?	31a			
Does the commercial use music?	32			
Does the comercial use singing?	33			
Does the commercial promise social attractiveness from using the product/brand?	34			
Does the commercial promise healthiness from using the brand/product?	35			
Does the commercial promise sexual attractiveness from using the product?	36			
Does the commercial basically tak place in a working situation?	37			
Does the commercial basically take place in a leisure situation?	38			

	No	1: yes	2: no	3: unc.
Is the setting/scene "at home"?	39			
Is the setting/scene "at work"?	4o			
Is the setting/scene urban?	41			
Is the setting/scene rural/countryside/nature?	42			
Is the setting/scene obviously characteristic for a specific nation?	43			
Is the setting/scene typically international?	44			
Is there one or more persons seen in the commercial?	45			
Is a person heard in the commercial?	46		:go to 5o	
Is the voice a male voice?	47			
Is the voice talking to the persons in the commercial?	48			
Is the voice talking to the viewer?	49			
Are there non-human (cartoon-like) animated figures in the commercial?	5o			
Do the non-human figures talk to others in the commercial?	51			
Do the non-human figures talk to the viewer?	52			
Does the understanding of the commercial depend on the understanding of the language?	53			

Other comments:.....

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Annex 2:

Instructions for coding of TV-commercials,
cf. Coding Scheme

Watch the whole commercial. If ZDF measure the time, cf. Q 3. The length of the STV-commercials is written on the cassette. So is the month, cf. Q 2.

All questions - when not illogical - refer to both the visual and the spoken language.

Q 4: More than one language may be registered. Be aware of written language especially on the wrapping and th· like.

Page 1 offers no problems of any kind.

After filling out this page it has proved helpful to describe the commercial verbally, cf. page 2.

It is important to quote the argument(s) for using the product as exactly as possible in English or English translation.

Q 6: A brand name is a name given to a product different from the generic product concept and often in combination with the name or part of the name of producer.

Q 7: A retailer sells directly to the consumer.

Q 8: Public organization covers a generic for all non-profit advertisers.

Q 9: Yes if the product or the package is shown or the product is verbally described.

Q 10: Be careful to separate this from the brand name. Yes, only if positive that the name is or must be the name of the company behind the product.

Q 11: Any kind of price ('about', suggestive) leads to a positive registration.

Q 12: Varieties are different sizes, colours, qualities, quantities and the like.

Q 13: Quantity includes capacity.

Q 14: Any kind of hint to learn more about the product by asking a dealer or neighbour to get a pamphlet or consult consumer information.

Q 15: Instruction that tell how to use and/or keep and maintain the product.

Q 16: E.g. components, ingredients or (other) quality components like e.g. 'no sugar'. Also claims like 'keep your breath fresh' meaning that a reproduction of some of the arguments from pag. 2 is possible.

Q 17: Guarantee also means warranty. A 'Yes' means that the commercial carries information about post purchase assurances that accompany the brand.

Q 18: -

Q 19: 'Yes' if the commercial mentions that the consumer can regret his or her purchase and get the mony back.

Q 20: 'Yes' demands a direct invitation to compare the brand with another <u>or</u> that the commercial does the comparison.

Q 21: -

Q 22: A 'Yes' demands that the commercial quotes some kind of informative material for which an independant authority is at least partly responsible.

Q 23: A 'Yes' follows from any mentioning of dangers for the consumer by using the product or ways the product may be spoiled or mentioning of safety features of the product.

Q 24: -

Q 25: -

Q 26: 'Yes' demands that the commercial mentions limited-time nonprice deals available with a particular purchase.

Q 27: A 'Yes' means that evidence is presented that the taste of a particular brand is perceived as superior in taste by a sample of potential customers. (Not the opinion of the advertiser!).

Q 28: A 'Yes' demands that specific data are given concerning the nutritional content of the brand.

Q 29: A 'Yes' demands that results gathered by an 'independent' research firm is presented.

Q 30: A 'Yes' means that data gathered by the advertiser to compare the advertised brand with a competitor is presented. It is a subgroup of Q 20. The question (Q 30) is included to be able to compare the results with another analysis.

Q 31: A 'Yes' demands that a totally new concept is introduced during the commercial.

Q 31a: Please eliminate this question. The number is wrong and the question is the same as Q 29.

Q 32: Is music in the broadest sense of the word heard?

Q 33: Is singing in the broadest sense of the word heard?

Q 34: Here are not talking about an outspoken literal argu-
Q 35: ment, but about an indirect promise built up by the
Q 36: pictures and what is said or song. An interpretation is necessary to answer this question. I want your combined intuitive feeling and understanding of the commercial and the question.

Q 34: Social attractiveness means that people like you and like to be together with you, that your are popular, etc.

Q 35: -

Q 36: Sexual attractiveness means that the product makes the consumer attractive/more attractive/liked by the opposite sex.

Q 37: A 'Yes' means that the setting of the dominating part of the commercial is a typical working situation inside or outside the home.

Q 38: A 'Yes' means that the setting of the dominating part of the commercial is a typical leisure situation. It is not enough that the person doesn't do anything.

Q 39: A 'Yes' means that the dominating part of the commercial takes place in or around a private home. i doesn't matter what the person or persons are doing.

Q 40: "At work" means that the dominating part of the commercial takes place away from the home (factory, fishing boat, conducting the traffic).

Q 41: A 'Yes' means that the dominating part of the commercial takes place in urban surroundings.

Q 42: A 'Yes' means that the dominating part of the commercial takes place in non-urban surroundings.

Q 43: A 'Yes' means that the commercial carries stereotypes which clearly signal a specific nation or show characteristics closely associated with a certain nation or show easily identifiable landscapes or buildings or use phrases from a certain language.

Q 44: A neutral general scene is not enough for a 'Yes'. It must be connected with the specific style known as 'international'.

Q 45: Persons are living, human beings.

Q 46: A 'Yes' demands a voice without showing the speaking person. Typically a 'speaker' talking to the viewer or an 'adviser' talking to other persons in the commercial.

Q 47: The answer must rely on normal judgement and experience.

Q 48: See Q 46.

Q 49: See Q 46.

Q 50: - Cf. Q 45.

Q 51: See Q 48.

Q 52: See Q 49.

Q 53: The answer must rely on a general quick judgement concerning the understanding of the basic arguments for using the product.

TRANSMISSION LOG WEEK 17

Programme 729 Monday 23.4.84

MUSIC BOX 1
17.00 (Break 1) Wrigleys Juicy Fruit 30 secs
MUSIC BOX 2
18.00 (Break 2) Freia Milk Chocolate 50 secs
CARTOON: ROGER RAMJET
18.05 Clock
FIRST EASTER RABBIT
LINK
WAYNE AND SHUSTER
LINK
THE NEW DIC VAN DYKE SHOW
19.20 (Break 3) Sorbits Chewing Gum 22secs
Uncle Ben's Rice 20 secs
CHARLIE'S ANGELS
20.10 (Break 4) Omega 30 secs
20.10 Clock
VEGAS
21.00 (Break 5) COI: Dental Care 30 secs
21.00 Clock
SPORT: AMERICAN COLLEGE BASKETBALL: IOWA VS INDIANA
21.55 Clock
21.55 (Break 6) Coca Cola 30 secs
MUSI BOX 3
22.55 (Break 7) COI: Dental Care 30 secs
MUSIC BOX 4

Programme 730 Tuesday 24.4.84

MUSIC BOX 1
17.00 (Break 1) Coca Cola 30 secs
MUSIC BOX 2
18.00 (Break 2) Frolic DOg Food 30 secs
CARTOON: ROGER RAMJET
18.05 Clock
WAYNE AND SHUSTER
LINK
THE NEW DICK VAN DYKE SHOW
18.55 (Break 3) Omega 30 secs
SKYWAYS
19.45 (Break 4) Mars Snickers 30 secs
19.45 Clock
STARSKY AND HUTCH
20.35 Clock
THRILLMAKER SPORT: FLY WITH THE THUNDERBIRDS
21.00 (Break 5) COI: Dental Care 30 secs
SPORT: ICE HOCKEY: QUEBEC VS WINNIPEG
22.05 Clock
22.05 (Break 6) Wrigleys PK Gum 30 secs
MUSIC BOX 3
23.06 (Break 7) COI: Dental Care 30 secs
MUSIC BOX 4

Programme 731 Wednesday 25.4.84

MUSIC BOX 1
17.00 (Break 1) COI: Dental Care 30 secs
MUSIC BOX 2
18.00 (Break 2) Wrigleys Juicy Fruit 60 secs
CARTOON: ROGER RAMJET
18.05 Clock
WAYNE AND SHUSTER
LINK
THE NEW DICK VAN DYKE SHOW
18.55 (Break 3) Uncle Ben's Rice 20 secs
COI: Ladder Safety 14 secs
18.55 CLock
MOVIE: HOUSE ON SKULL MOUNTAIN
20.20 (Break 4) Coca Cola 30 secs
20.20 Clock
THE NATURE OF THINGS: MERCHANTS OF GRAIN
21.20 (Break 5) COI: Dental Care 30 secs
THE CHALLENGERS: SUPERFLIGHT
FAIRY PENGUINS
22.00 Clock
22.00 (Break 6) Sorbits Chewing Gum 22 secs
COI: Keep Europe Tidy 13 secs
MUSIC BOX 3
23.00 (Break 7) Freia Milk Chocolate 50 secs
MUSIC BOX 4

N.B. ALL TIMES ARE APPROXIMATE (+/- 5 MINS) AND ARE QUOTED IN UK TIME

TRANSMISSION LOG WEEK 17 CONT'D

Programme 732 Thursday 26.4.84

MUSIC BOX 1
17.00 (Break 1) Wrigleys PK Gum 30 secs
MUSIC BOX 2
18.00 (Break 2) COI: Dental Care 30 secs
TWO YEARS OF SATELLITE
LINK
CARTOON: ROGER RAMJET
18.10 Clock
WAYNE AND SHUSTER
LINK,
THE NEW DICK VAN DYKE SHOW
18.55 (Break 3) Frolic Dog Food 30 secs
SKY WAYS
19.45 (Break 4) Sorbits Chewing Gum 22 secs
COI: Keep Europe Tidy 13 secs
19.45 Clock
FAMILY
20.35 (Break 5) Coca Cola 30 secs
20.35 Clock
SPORT: USFL FOOTBALL: PITTSBURGH MAULERS VS MICHIGAN PANTHERS
22.05 Clock
22.05 (Break 6) COI: Dental Care 30 secs
MUSIC BOX 3
23.05 (Break 7) Mars Snickers 30 secs
MUSIC BOX 4

Programme 733 Friday 27.4.84

MUSIC BOX 1
17.00 (Break 1) Uncle Ben's Rice 20 secs
MUSIC BOX 2
18.00 (Break 2) Wrigleys PK Gum 30 secs
CARTOON: ROGER RAMJET
18.05 Clock
WAYNE AND SHUSTER
LINK
THE NEW DICK VAN DYKE SHOW
18.55 (Break 3) Coca Cola 30 secs
CHARLIE'S ANGELS
19.45 (Break 4) COI: Fire Prevention 30 secs
19.45 Clock
VEGAS
20.35 (Break 5) Omega 30 secs
DAVIS CUP TENNIS
21.30 (Break 6) Freia Milk Chocolate 50 secs
TENNIS COMPETITION 2
21.35 Clock
THE JAZZ LIFE OF JOHNNY CRIFFIN
22.10 Clock
22.10 Break 7) Wrigleys Juicy Fruit 30 secs
MUSIC BOX 3
23.10 (Break 8) COI: Dental Care 30 secs
MUSIC BOX 4

Programme 734 Saturday 28.4.84

MUSIC BOX 1
17.00 (Break 1) COI: Dental Care 30 secs
MUSIC BOX 2
18.00 (Break 2) Sorbits Gum 22 secs
18.00 Clock
MY FAVOURITE MARTIAN
18.25 (Break 3) COI: Dental Care 30 secs
LIONA BOYD: FESTIVAL OF GUITAR
19.15 (Break 4) Mars Snickers 30 secs
19.15 Clock
MOVIE TIME
LINK
MOVIE: TOUGHTEST MAN ALIVE
20.55 (Break 5) Frolic Dog Food 30 secs
20.55 (Break 5) Frolic Dog Food 30 secs
20.55 Clock
SPORT: ALL STAR WRESTLING
21.55 Clock
21.55 (Break 6) Wrigleys Juicy Fruit 30 secs
MUSIC BOX 3
22.55 (Break 7) Coca COla 30 secs
MUISC BOX 4

N.B. ALL TIMES ARE APPROXIMATE (+/- 5 MINS) AND ARE QUOTED IN UK TIME

Programme 735 Sunday 29.4.84

MUSIC BOX 1
17.00 (Break 1) The Sun 20 secs
MUSIC BOX 2
18.00 (Break 2) Coca Cola 30 secs
18.00 Clock
STAR FLEET
18.25 (Break 3) The Sun 20 secs
COI: Keep Europe Tidy 12 secs
18.25 Clock
YOUNG RAMSAY
19.15 (Break 4) Uncle Ben's Rice 20 secs
The Sun 20 secs
ALL YOU NEED IS LOVE
20.10 (Break 5) The Sun 20 secs
COI: Keep Europe Tidy 12 secs
20.10 Clock
MOVIE: STEVIE
LINK
ARTISTRY OF ANGEL ROMERO
22.00 Clock
22.00 (Break 6) Wrigleys PK Gum 30 secs
MUSIC BOX 3
23.00 (Break 7) Sorbits Chewing Gum 22 secs
MUSIC BOX 4

N.B. ALL TIMES ARE APPROXIMATE (+/- 5 MINS) AND ARE QUOTED IN UK TIME

Annex 4:

SKY CHANNEL ADVERTISING RATES

Spot Length	30"
Weekly Package: (£250 per spot) 15 spots (R.O.W.)	£3,750
Quarterly Package: (£200 per spot) 75 spots (R.O.P.)	£15,000

Minimum booking 15 spots.

Fixed placements to be negotiated.

Other lengths pro rata to basic 30" rate.

Satellite Television PLC pays 15% Agency Commission.

SALES CONTACTS

TIM BRADSHAW—Sales Controller

UK SALES

MARK WOOD—UK Sales Co-ordinator
HELLE BECK-ANDERSEN—Sales Information Officer
ROSEMARY STOCK—Advertising Traffic & Copy Control Manager
25/32 Marshall Street, London W1V 1LL.
Telephone:(01) 439-0491. Telex: 266943.

CENTRAL EUROPE

BERNARD PINGREE—Sales Co-ordinator
43 Chemin de la Cocuaz, 1253 Vandoeuvres, Switzerland.
Telephone: (022) 501-330. Telex: 27416.

SOUTHERN EUROPE

MICHAEL ERLEIGH & KENNETH MELVILLE—Sales Agents
Selective Communications Ltd.,
Via del Corso 52 (Int. 7), Rome 00186.
Telephone: (6) 678-3583. Telex: 614559.

SCANDINAVIA

FINN ISDAHL—Sales Agent
P.O. Box 72, 5040 Paradis, Norway.
Telephone: (5) 134010. Telex: 42777.

FAR EAST

HIROSHI IWAI—Sales Agent
Media House Inc.
Suite 212, Azabu Heights, 1-5-10 Roppongi, Minato-ku, Tokyo 106.
Telephone: (3) 585-9571. Telex: 28208.

FOREIGN CURRENCY RATES

Satellite Television will accept orders in US$ at the rate of exchange of $1.50 to £1; however, Satellite TV reserves the right to vary this rate in the event of a significant currency fluctuation. Orders making use of rate protection must be in £ sterling.

SPONSORSHIP

Advertisers may, subject to individual negotiations, sponsor programmes or events. Please contact your sales executive for further information.

TRANSMISSION TIMES

The precise transmission days and times of spots booked within packages are entirely at the discretion of the Company, but all reasonable efforts will be made to ensure that spots are rotated across the available breaks.

If they so request, advertisers with spot packages will be advised of the scheduled time of transmission of their commercials on the Monday preceding the week of transmission, but without a guarantee that such times will be adhered to. Transmission certificates issued monthly.

BOOKING, COPY AND CANCELLATION DATES

Booking must be made 30 days or more prior to the start of transmissions.

Acceptable advertisement copy is required (if new and not held by Satellite TV) 21 days prior to transmission. Copy instructions for repeats of currently-held copy are required in writing 14 days prior to transmission. Instructions to alter copy already held are also required in writing 14 days prior to transmission.

For extension on copy dates please contact the Advertising Traffic and Copy Control Manager. Unless previously arranged a late copy surcharge of 15% will be applied to all spots affected. (See Copy Control for mechanical specifications and Section 4 of "Satellite Television PLC General Terms and Conditions of Contract" for acceptance of advertisements.)

CANCELLATIONS

Individual spot bookings may be cancelled at 3 months notice without surcharge.

Exclusive spot packages, weekly or quarterly, are non-cancellable.

COPY CONTROL, COPY REQUIREMENTS AND PROCEDURES

Three copies of the script of a proposed television advertisement should be sent to Satellite Television for approval. When an approved script has been agreed upon, the agency/advertiser may go ahead and make the commercial. A copy of the approved script and a clearance form will be sent to the agency/advertiser. Satellite Television Copy Clearance will follow the United Kingdom advertising guidelines as set out by the IBA/ITCA.

When the commercial has been made, either a Sony or VHS cassette should be sent to Satellite Television for approval—together with three post-production scripts and three consignment notes.

When the commercial has been seen and approved, an approved script and film clearance form will be sent to the agency/advertiser.

For further information please contact the Advertising Traffic and Copy Control Manager.

SHIPPING INSTRUCTIONS

1. Advertisement copy to the Advertising Traffic and Copy Control Manager, Satellite Television PLC, Craven House, 25-32 Marshall Street, London W1V 1LL. Telephone (01) 439 0491. Telex: 266943.

2. For material being sent from outside the UK by air freight please address to: Satellite Television PLC, c/o MAC Shipping, Stanstead Airport, Essex, UK.

3. Please route via KLM Airlines to Amsterdam connecting Air UK to Stanstead Airport.

4. On the shipping document please state:
The product name and title.
Whether the material is film or tape.
The value for insurance purposes.
That this is a temporary import and is to be returned.

5. Advise the Advertising Traffic and Copy Control Manager of airway bill number, date, time, carrier and flight number by telex.

6. Films and tapes will be held for collection for up to six months from the date of the last transmission, after which time they will be destroyed.

All costs for the return of films and tapes must be met by the Agency or the Advertiser.

Annex 5

Sky Channel: Commercials in February, March, and April 1984

Brand	Spot length in seconds	Times shown			Total
		February	March	April	
Wrigley's P K Gum	30	39	35	16	90
Mars Snickers	30	27	27	11	65
Sor-Bits Chewing Gum	20	32	19	10	61
Bentasil	15		13	14	27
Impulse Perfume Spray	30	10	15		25
Kellogg's Smacks	30	12		12	24
Frolic dog food	30		10	13	23
Omega wrist watch	30		10	13	23
Coca Cola	30			22	22
The Sun	20			22	22
Freia Milk Chocolate	50		9	12	21
Freia Rapid Bar	30	16	3		19
Maryland Cookies	30			19	19
Wrigley's Juicy Fruit	30		2	15	17
Uncle Ben's Rice	20			13	13
Kellogg's Frost Flakes	30	11	1		12
Kellogg's Corn Flakes	30		10	1	11
Kellogg's Rice Krispies	30		11		11
Scand-Video	30		1		1
Total		147	166	193	506
Number of brands		7	14	14	
Omega identification and clock	10	83	120	64	

Source: Sky Channel's transmission logs, week 5-17, 1984, submitted by Satellite Television.

Classification of advertised brands on Sky Channel in February, March, and April 1984, cf. item 5 in the coding scheme.

Category	Time in secs.	Number of brands	% of brands	Total time	% of time
7: Books, magazines, newspapers					
The Sun	440				
Sub total		1	5	440	3
9: Chocolate, sweets, gum					
Wrigley's P K Gum	2,700				
Mars Snickers	1,950				
Sor-Bits Chewing Gum	1,220				
Bentasil	405				
Freia Milk Chocolate	1,050				
Freia Rapid Bar	570				
Wrigley's Juicy Fruit	510				
Sub total		7	37	8,405	58
12: Soft drinks					
Coca Cola	660				
Sub total		1	5	660	5
13: Food products					
Kellogg's Smacks	720				
Maryland Cookies	570				
Uncle Ben's Rice	260				
Kellogg's Frost Flakes	360				
Kellogg's Corn Flakes	330				
Kellogg's Rice Krispies	330				
Sub total		6	32	2,570	18
14: Pet food					
Frolic dog food	690				
Sub total		1	5	690	5
20: Personal care, hygiene					
Impulse Perfume Spray	750				
Sub total		1	5	750	5
21: Watches, jewellery, glasses					
Omega wrist watch	690				
Sub total		1	5	690	5
25: Other					
Scand-Video	30				
Sub total		1	5	30	0
All products	14,235	19	99	14,235	99

Source: Content analysis and transmission logs.

Annex 7

Product categories' share of TV advertising: Sky Channel 1983 and 1984, ITV and Channel Four 1983, ZDF and NDR 1983, ZDF 1984

Product category (1)	Sky Channel, week 1-35, 1983 (2)		Sky Channel, February, March, April 1984 (3)		ITV + Channel Four, June 1983 (4)	Percent of seconds 1983 (5)		ZDF, week 15, 1984 (6)	
	% of brands	% of seconds	% of brands	% of seconds	% of income	ZDF	NDR	% of brands	% of seconds
1: Cars	0	0	Included below		Included below	1,9	1,9	1	1
2: Women's clothing	0	0	-	-	-			2	1
3: Men's clothing	0	0	-	-	-	0,8	0,5	0	0
4: Children's clothing	0	0	-	-	-			0	0
5: Durables for home & garden	0	0	7	2	4	5,5	3,3	8	8
6: Books, magazines, newspapers	5	3	Included below		Included below	9,6	6,7	3	3
7: Chocolate, sweets, gum	37	58	15	25	4	6,4	11,8	8	8
8: Wine	0	0						0	0
9: Beer	0	0	8	9	14	7,2	10,5	0	0
10: Liquor	0	0						2	1
11: Soft drinks	5	5	11	18	4	2,4	2,3	5	5
12: Food products	32	18	26	18	14	14,9	13,6	22	17
13: Pet food	5	5	-	-	-	Included in food products		1	3
14: Foto and film	0	0	-	-	-	0,9	1,4	2	2
15: Toys	0	0	-	-	-	-	-	3	3
16: Cleaning, washing	0	0	4	3	5	12,8	14,5	12	13
17: Gas, oil	0	0	-	-	-	Included in cars		1	1
18: Tobacco, cigarettes	0	0	-	-	-	0	0,1	0	0
19: Personal care, hygiene	5	5	4	2	6	23,6	24,9	22	22
20: Watches, jewelry, glasses	5	5	-	-	-	Included in foto and film		1	1
21: Insurance, banking	0	0	0	0	9	5,6	2,9	4	6
22: Public announcements	0	0	-	-	-	2,7	0,2	0	0
23: Travelling	0	0	Included below		-	0,8	1,3	0	0
24: Other	5	0	7	9	0	2,3	2,5	3	5
Leisure, media, education	-	-	11	10	11	-	-	-	-
Transportation, travelling, cars	-	-	7	7	9	-	-	-	-
Retail chains	-	-	0	0	13	2,6	1,6	-	-
Total	100	100	100	100	93	100	100	100	100
Basis	19	14,385	27	3,060	171 mill £	-	-	246	7,530

(1): The product categories are the ones used in this study plus three categories after the dotted line from the two British studies. The use of the product categories is an approximate since the categories are not defined in the sources used.

(2): See table 7.

(3): Source: A/S Norsk Reklame-Statistik as quoted in Holmlöv & Julander 1984.

(4): Audits of Great Britain Ltd & BARB, 1983 as quoted in Holmlöv & Julander. (The total also adds up to 93% in the source.)

(5): This coloumn covers all West German tv advertising in 1983. Source: Zentralausschuss der Werbewirtschaft: Werbung 84.

(6): See table 7.

Annex 8

ZDF: Commercials in week 15, 1984.

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Swatch	Wrist watches	2	10	21
Frolic	Dog food	1	30	14
Rowenta	Vacuum cleaner	3	15	6
Kinderschokolade	Chocolate	3	30	8
Vileda	Kitchen towels	2	30	17
Thera-med	Toothpaste	1	30	20
Matchbox	Toys	1	20	16
(Verein Deutscher Ingenieure	Engineering work	1	50	25)
Ford Sierra	Cars	1	10	1
Toblerone	Chocolate	2	20	8
Siemens	Percolator	5	20	6
Triumph	Underwear	1	20	3
Süddeutche Klassen-lotterie	Lottery	2	20	25
Blenda-med	Toothpaste	2	40	20
Gardena	Garden tool	1	20	6
Biovital	Vitamines	1	30	20
Kiosk	Cassette tapes	2	20	25
Ponds	Soap	2	20	20
Wilkenson	Garden tool	2	15	6
Yes	Chocolate	1	20	8
Shamtu	Cosmetics	1	30	20
Wrigley's	Chewing gum	3	20	8
Moulinex	Kitchen machine	2	30	6
Holland-Gouda	Cheese	1	15	13
(Deutschland Blumenland	Flowers	1	15	25)
After Eight	Chocolate	1	20	8
Tosca	Cosmetics	1	30	20
Jensen's Suppen	Instant soup	1	15	13
Togal	Pain reliever	1	20	20
Staal Fachingen	Mineral water	1	30	12
Olympus XA 2	Camera	1	20	15

Annex 8, cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Milram	Quark	2	15	13
Playtex	Underwear	2	20	3
Vivil	Sweets	1	20	8
Viss	Scouring powder	1	30	17
Knappers	Sweets	2	15	8
Braun	Kitchen machine	2	20	6
McCain	Potato balls	1	15	13
Volksfürsorge Bausparkasse	Banking	2	15	22
Combozola	Cheese	1	60	13
(Confectioner's trade organization	The use of confectioner's	1	20	25)
Gilette	Shaving articles	1	30	20
Arriel	Detergent	1	50	17
Bionorm	Diet food	4	15	13
Kukident	Cleaning of prostheses	1	30	20
Bonella	Margarine	2	30	13
Hockland	Cheese	1	30	13
Texaco	Gas stations	1	20	18
Compo	Garden fertilizer	1	20	25
Rabenhorst	Juice	1	20	12
Hakle	Toilet paper	2	20	20
AEG	Freezer	2	30	6
Dané	Cosmetics	2	20	20
WC-ente	Toilet cleaning	2	20	17
Chambourcy	Yoghurt	2	20	13
Dufti	Dolls	2	20	16
Ronnies Pop Show	LP -records	2	20	25
Maggi	Instant soup	1	20	13
Nova	Insurance	1	20	22
Nesquick	Chocolate soft drink	2	20	13
Erdal	Shoe polish	1	20	17

Annex 8, cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Wasa	Bread	1	20	13
Tchibo	Drugstore chain	1	40	20
Braun	Hair dryer	1	15	20
Haribo	Sweets	1	20	8
Bama	Insoles	1	20	20
(-	Wine	1	20	9)
Schwäbisch Halle	Banking	1	30	22
Minuto	Instant food	1	20	13
Oil of Olaz	Cosmetics	1	30	20
Pepsi	Cola	2	20	12
Ajax	Window polish	2	20	17
Colgate	Toothpaste	1	30	20
Allianz	Insurance	1	60	22
Minolta	Cameras	1	30	15
Spengel	Chocolate	2	20	8
Majo-kit	Toys	2	20	16
Børn	Diapers	1	30	20
Vita Buerlecitin	Medicine	2	20	20
KKB Bank	Banking	1	30	22
Kalinka	Kefir	2	20	13
Echt Wannen Spray	Scouring powder	1	20	17
Kraft	Cheese	2	40	13
Corega Tabs	Cleaning of prostheses	1	20	20
Jacobs	Coffee	1	30	12
Apollonaris	Mineral water	1	20	12
WC-rein	Toilet cleaning	1	30	17
Fanta	Orange drink	2	15	12
(	Saving energy	1	30	18)
Kraft	Instant food	1	30	13
Echo des Frau	Magazine	1	15	7
2'Oreal Free Style	Cosmetics	4	30	20
Tai Ginseng	Medicine	2	30	20

Annex 3, cont.

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Luns	Diapers	1	40	20
Coca Cola Light	Cola	2	30	12
Mars	Chocolate bar	1	30	8
Danone	Yoghurt	1	30	13
Persil	Detergent	2	40	17
Doppelherz	Vitamines	1	15	20
Poly-kur	Hair conditioner	1	30	20
Hipp-Diät	Diet food	2	20	13
Hansa plast	Sticking plaster	1	30	20
Mariacron	Liquor	1	30	10
LBS-Baunsparkasse	Banking	1	30	22
(-	Butter	1	30	13)
Philips	Air cleaning machine	1	30	6
Maggi	Instant gravy	1	50	13
Mouson	Cosmetics	1	20	20
Weisser Riese	Detergent	1	30	17
Dusch-Das	Soap	1	30	20
Dujardin	Liquor	1	$5	$0
Palmin	Grease for cooking	1	30	13
Milva	LP -records	1	30	25
Zentis	Jam	1	20	13
Palmolive	Soap	2	20	20
Miele	Kitchen machines	2	15	6
Hailo	Iron	1	30	17
Uncle Ben's	Rice	1	20	13
Die 2	Magazine	1	20	7
Schweppes	Soft drinks	1	30	12
Lenor	Rinse detergent	1	40	17
Eduscho	Coffee	2	15	12
Golf-Schöntöner	Cosmetics	1	30	20
Softis	Paper handkerchief	1	30	20
Zott	Yoghurt	1	30	13

Annex 8, cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Bahlsen	Cookies	1	20	13
Vedes	Toy retail chain	1	30	16
Ajax	Scouring powder	1	40	17
Varta	Batteries	1	30	25
Sapur	Carpet detergent	1	30	17
Erasco Frisch Gemüsetopf	Instant food	1	20	13
Gardinenneu	Curtain detergent	2	20	17
Kaffee Hag	Coffee	1	30	12
Frau im Spiegel	Magazine	1	15	7
Agfachrome	Film	2	15	15
Exquisa	Cheese	1	15	13
Raiffeissenbanken	Banking	2	30	22
Merci	Chocolate	1	30	8
Nippon	Waffles	1	20	8
Jonathan	Cheese	1	15	13
Pfanni	Instant food	1	30	13
Ilja Rogolff	Medicine	1	20	20
Milja	Chocolate	1	30	8
Melitta	Coffee	1	20	12
Eis-Marie	Ice cream	2	30	13
Ziel	Toothpaste	1	30	20
Botterrahm	Margarine	1	20	13
Maggi Fix	Instant food	1	30	13
Granni Vitamin Genuss	Fruit juice	2	20	13
Bärenmarke	Instant food	1	15	13
Omo	Detergent	1	40	17
Natreen	Artificial sweetening	1	20	13
Bild-Woche	Magazine	1	20	7
(GES	Public announcement	1	50	23)

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Der Kaufhof/, Miss Astor	Department stores/ dresses	1	30	3
Choko Crossies	Chocolate	1	20	8
Sargo Plus	Scouring powder	1	20	17
Pattex	Glue	1	20	15
Livio	Ketchup	1	20	13
Chicogo	Cosmetics	1	30	20
Black & Decker	Hobby tools	1	30	6
(Fernmeldeamt	Cable-tv	1	40	25)
8 x 4	Cosmetic	1	20	20
Freizeit Revue	Magazine	1	30	7
Wella Balsam	Shampoo	1	30	20
Lego	Toy	1	20	16
Cape	Fruits	1	20	13
Commerzbank	Banking	1	30	22
Hanuta	Wa fles	3	20	8
-	Movie	1	30	7
Post	Mail box	1	30	6
Peugot Talbot	Car	1	30	1
Fasa	Detergent	1	30	17
Leifheit	Clothes horse	1	20	17
Somara	Medicine	1	30	20
Nordsee	Instant food	1	30	13
Allianz	Insurance	1	30	22
Forsana	Diet food	1	30	20
Tefal	Kitchen utensils	2	20	6
Pur	Detergent	1	30	17
Credo	Cosmetic	1	30	20
Poliboy	Polish	1	20	17
Heitmann Eier Farben	Colours	2	15	16
Tosca	Cosmetic	1	30	20
Onko	Coffee	1	40	12

Annex 8, cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Natreen	Diet food	1	20	13
Sidolin	Window polish	1	20	17
Lieken Urkorn	Bread	1	20	13
Commodore 64	Home computer	1	30	6
Abfluss frei	Toilet cleaning	1	20	17
Poochie	Dolls	1	20	16
Henkel Pril	Detergent	1	30	17
Melitta	Coffee filters	1	20	25
Hit News	LP-records	1	20	7
Aktiv-Kapseln	Medicine	1	20	20
Hakle Feucht	Toilet paper	1	20	20
Emsa	Thermos	1	20	6
Hohes C	Fruit juice	1	30	20
Dralle Sulfrin	Soap	1	30	20
Nacht und Tag	Coffee	1	15	12
Bi-Fi	Salami	1	15	13
Polaroid	Camera	1	30	15
Westbury/C & A	Coats/Department store	1	30	4
Moltex	Diapers	1	30	20
Krupps	Mixer	1	30	6
Leifheit	Floor cleaning machine	1	15	17
Substral	Houseplant fertilizer	1	20	25
Tuba	Carpet cleaning	1	20	17
His for Her	Trousers	1	20	3
Korall	Detergent	1	30	17
Crunch & Slim	Diet food	1	20	20
Pal	Dog food	1	30	14
Toffifee	Chocolate	2	15	8
Maggi	Soup drink	1	15	13
Nadler	Salad dressing	1	30	13

Annex 8. cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Schüko-Fenster	Windows	1	15	6
Kellog's Smacks	Cereal	1	20	13
Donald Duck	Magazine	1	20	7
Junghans	Watches	1	20	21
Dentagard	Toothpaste	1	30	20
Rama	Margarine	1	30	13
Heisse Tasse	Instant food	1	15	13
	LP-record	1	30	7
Tiffany	Dairy product	1	15	13
Nudel up	Instant food	1	20	13
Müsti Riegel	Cookies	1	30	13
Spalt	Medicine	1	20	20
Langnese Honig	Honey	1	20	13
4 c, De Beers	Diamond	1	20	21
Campari	Liquor	1	30	10
Dresdner Bank	Banking/Kruger Rand	2	40	22
Primis	Müesli	1	30	13
BfG	Banking	1	40	22
Odot	Mouth cleaner	1	30	20
Baccardi	Liguor	1	30	10
Alevita	Diet food	1	30	13
Lysmina	Cosmetics	1	30	20
(-	Telephone book	1	15	23)
Lux	Soap	1	30	20
Cedenta	Prosthesis glue	1	20	20
ATA	Scouring powder	1	30	17
Jade	Cosmetics	1	20	20
Matador	Toys	1	30	16
Esso	Oil	1	30	18
Maoam	Sweets	1	20	8
Rügenwalder	Salami	1	15	13

Annex 8, cont'

Brand	Product	Number of identical spots	Spotlength in seconds	Product category
Impuls	Cosmetics	1	30	20
Palmolive	Detergent	1	30	17
Irisher Frühling	Soap	1	30	20
Portas	Doors	1	20	6
Rondino	Chocolate	1	30	8
Nordmende	Video equipment	1	15	6
McDonalds	Fast food chain	1	30	13
Capri-Sonne	Fruit juice	1	30	12
Meister Proper	Scouring powder	1	40	17

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